Vendor
User's Manual

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eFacilities System Overview

eFacilities is a web based facility management system that provides a complete solution for CarMax to manage multiple stores and properties. The core of the eFacilities system is a secure, centralized database used to store facility management documents that are created and updated by members of a facility workgroup. The facility users obtain access to the eFacilities system through a web browser or from a telephone.

The eFacilities application automates facility management procedures by connecting users and facility management documents through configurable workflow processes. eFacilities provides the framework for users to communicate and collaborate throughout the duration of facility management functions, including facility maintenance, projects, and asset management.

A variety of users are supported including Store Managers, Facility Coordinators, Contractors, and Home Office Accounting. Facility management documents include Work Requests, Work Orders, Projects, Contracts and Invoices. The user roles determine which facility management documents a user can create and update and which procedures a user can perform relative to the facility management workflow.

The eFacilities Web Interface provides visibility and access to all aspects of the facility management workflow. Related to facility maintenance, for example, the Web Interface provides the capability to create Work Requests and dispatch Work Orders, to exchange messages with other users for coordinating work in progress and resolving issues, to generate reports, manage workflow, and process Invoices.

This guide provides the Contractor with an overview of the eFacilities system and defines the Contractor's role and responsibilities in the facility maintenance process.

Maintenance Workflow

The eFacilities facility maintenance workflow includes activities performed by the roles of a Store Manager, Facility Coordinator, and Contractor. Work Request, Work Order and Invoice documents are created and flow through various states from initial creation to completion. The current state is displayed in the status field of the document. The status of the document changes when a user takes the next appropriate action. Depending on system configuration parameters, the current document status and the action performed by the user, the status may be changed automatically by the system, or the user may need to change the status manually to continue the workflow process.

The eFacilities home page displays maintenance workflow information relevant to the particular user and any maintenance issues that require immediate attention.

Maintenance workflow documents that need attention are grouped together and listed under tab headings on the home page. Each user has different tab headings depending on their responsibilities. A typical Contractor's home page and tab headings are displayed in Figure 5. Work Order, Work Request and Invoice documents that do not need immediate attention can be accessed by search or view options available on the home page.

The user that is required to take the next action in the workflow process is notified as soon as the document status has been changed. The system notifies the user that an action is required by placing

the document under the appropriate tab on the user's home page. The system may also notify the user by pager, fax, or e-mail notification.

The system monitors the workflow process between responsible users. If a user does not take the required action in a certain amount of time, or the status of a document changes to a condition that requires attention, the document is listed under the appropriate tab on the user's home page.

Throughout the maintenance workflow process, communication between users is accomplished through a messaging interface within the eFacilities system. Detailed information can be included through note and file attachments within the maintenance documents. Standard communication methods are also supported, including e-mail, fax and paging. See Workflow Communication on page 26 for more information on workgroup communication.

Contractor Role

The eFacilities Web Interface provides Contractors with the capability to acknowledge Work Orders, update job status, and submit Invoices. The eFacilities Telephone Support Hotline allows the Contractor to acknowledge the receipt of Work Orders, report job start and completion, and to update job status.

When a new Work Request is created, either it is assigned to a Facility Coordinator or a Work Order is automatically generated and dispatched to a Contractor. System configuration parameters determine how a new Work Request is handled.

If a Work Order is generated and dispatched directly to a Contractor, the status of the Work Request is changed to "In Progress". The Work Order is created with the status of "Assigned to Contractor" and the Work Order is dispatched to the Contractor via e-mail, and/or pager depending on the system configuration. The Contractor is instructed to perform the work described in the Work Order for the selected store location, and is authorized to invoice up to the amount listed in the Not to Exceed (NTE) field of the Work Order.

The Contractor acknowledges receipt of the Work Order and schedules the work, begins work on the job and completes the job. The Contractor is responsible for changing the status of the Work Order document during this process:

Figure 1 – Work Order Status Workflow for Contractors

Refer to Figure 2 for a detailed view of the Work Request and Work Order processing workflow.

If the Contractor is requested to generate a quote, the Work Order is displayed on the Contractor's home page in the **Quote Pending** tab. The Contractor generates a quote, changes the status to "Review Required" and the Work Order is listed under the Facility Coordinator's home page under the **Review Required** tab. The Facility Coordinator reviews and approves the quote and the status of the Work Order is changed to "Quote Approved" by the Facility Coordinator. The Work Order is then displayed under the **Quote Approved** tab on the Contractor's home page. The Contractor

completes the workflow and changes the status of the Work Order document from "Quote Approved" to "In Progress" and finally "Contractor Done".

Once the Contractor is done and the work is satisfactory, the Work Order status is changed to "Completed" and the Work order is ready for invoicing. The Work Order is listed under the **Invoice Pending** tab on the Contractor's Home Page. The Contractor completes the Invoice and adds the Invoice to the Work Order. The Contractor can choose to save the Invoice as "Draft" instead of saving and submitting the invoice for processing. Invoices that are saved as "Draft" are listed under the **Draft Invoices** tab. The Contractor can edit "Draft" invoices at any time and save the invoice to submit for processing.

The completed Invoice must be approved by a Facility Coordinator, and then released for export to an accounts payable system. After the Invoices are processed by the accounts payable system, payment information can be imported back into the system providing payment date, check numbers and payment amounts. Refer to Figure 2 for a detailed view of the invoice processing workflow.

If there is an issue with the workflow process, the associated Work Order is listed under the appropriate tab. If a Work Order is overdue for acknowledgement, work start, or completion, the Work Order is listed under the **Overdue** tab. If the Contractor does not generate a quote within a configurable period of time, the quote is considered overdue and the Work Order is listed under the **Quote Overdue** tab. If a Contractor cannot perform the work, the Contractor changes the status to "Declined" so the Facility Coordinator can take the appropriate action. If a Work Order includes a Contractor estimated completion date that is later than the scheduled completion date, the Facility Coordinator is informed and can either approve the change or work with the Contractor to resolve any problems. The Contractor can change the status of a Work Order to "Delayed" if they cannot continue working on a job. A delayed Work Order is listed under the **Delayed** tab. The Store Manager or Facility Coordinator can change the status of a Work Order from "Contractor Done" to "Unsatisfactory Completion" if there was a problem with the job. An Unsatisfactory Work Order is listed under the **Unsatisfactory** tab. If a submitted work order is not acceptable, the Facility Coordinator can reject the change the status of the Invoice to "Rejected" and the Invoice is listed under the **Rejected Invoices** tab.

The following sections describe the eFacilities Web Interface, Workflow Procedures, Workflow Communication and Telephone Support Hotline.

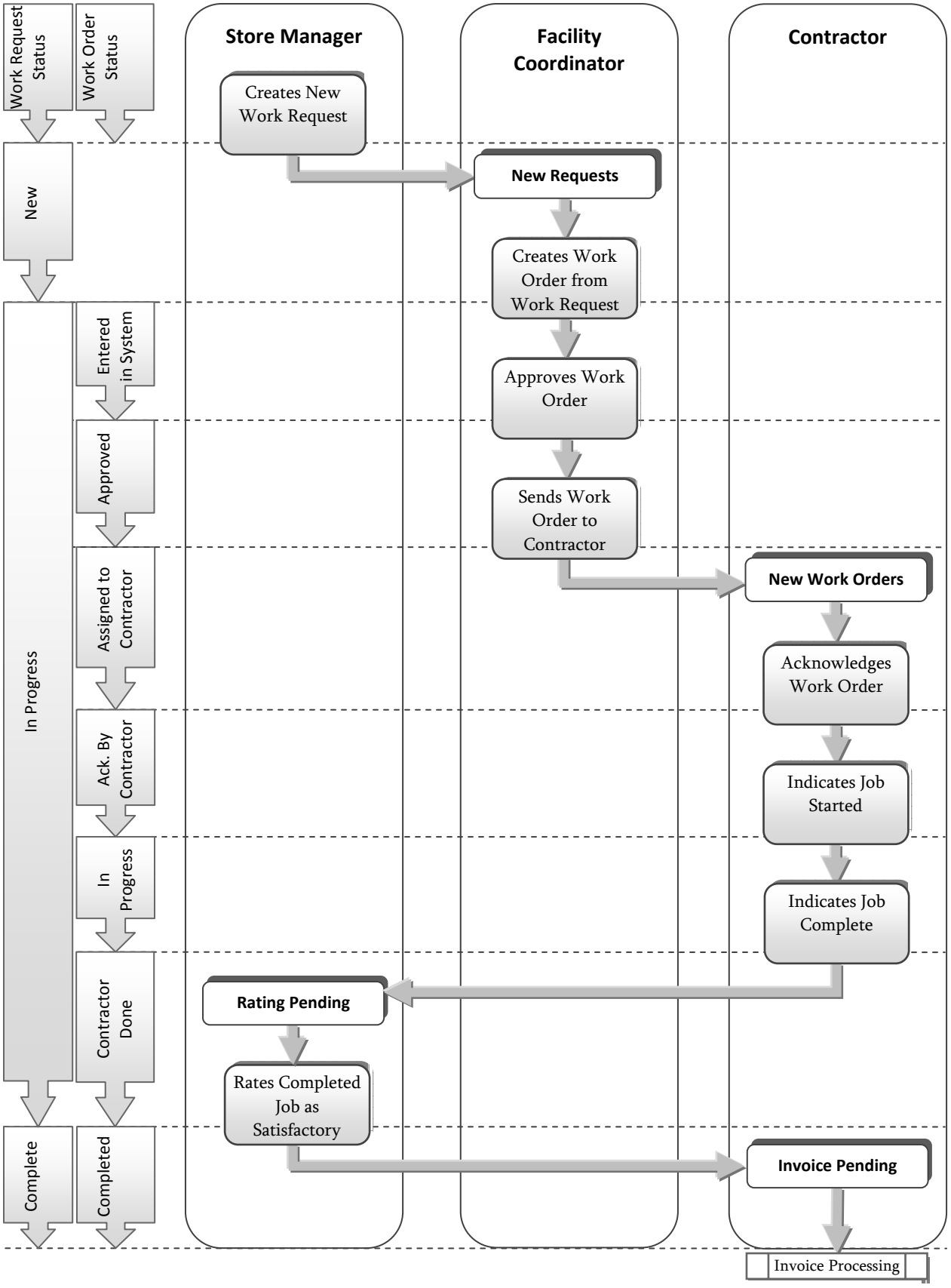

Figure 2 – Work Request and Work Order Workflow

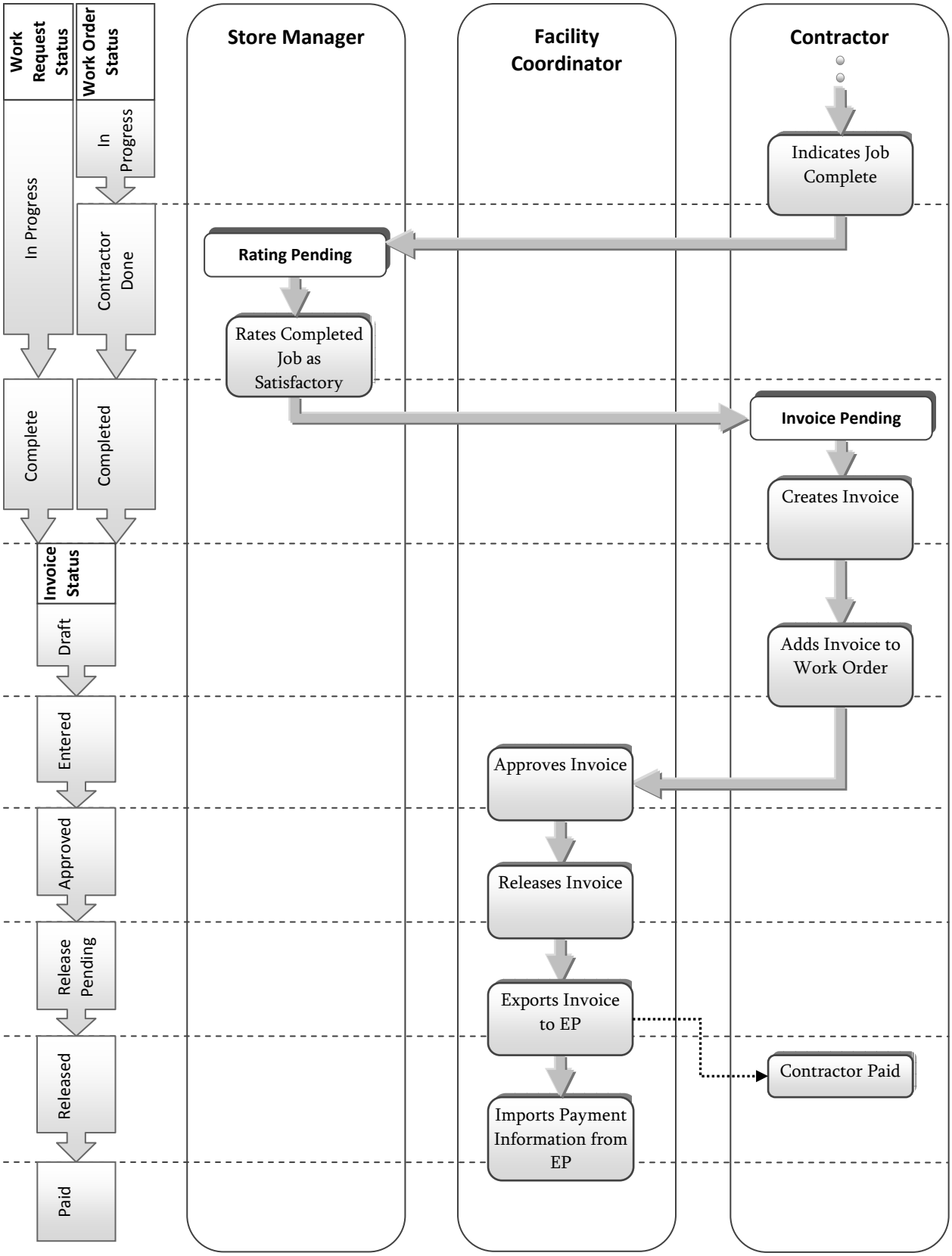

Figure 3 – Invoice Processing Workflow

Navigating eFacilities

Login to eFacilities

1. **Enter** the eFacilities web address provided by your customer in your web browser to access the Login page.
2. **Enter** your eFacilities username and password.
3. **Select "Secure Entire Session".** When you select the Secure Entire Session option all network traffic will be encrypted rather than just the login information.
4. **Click "Login".**

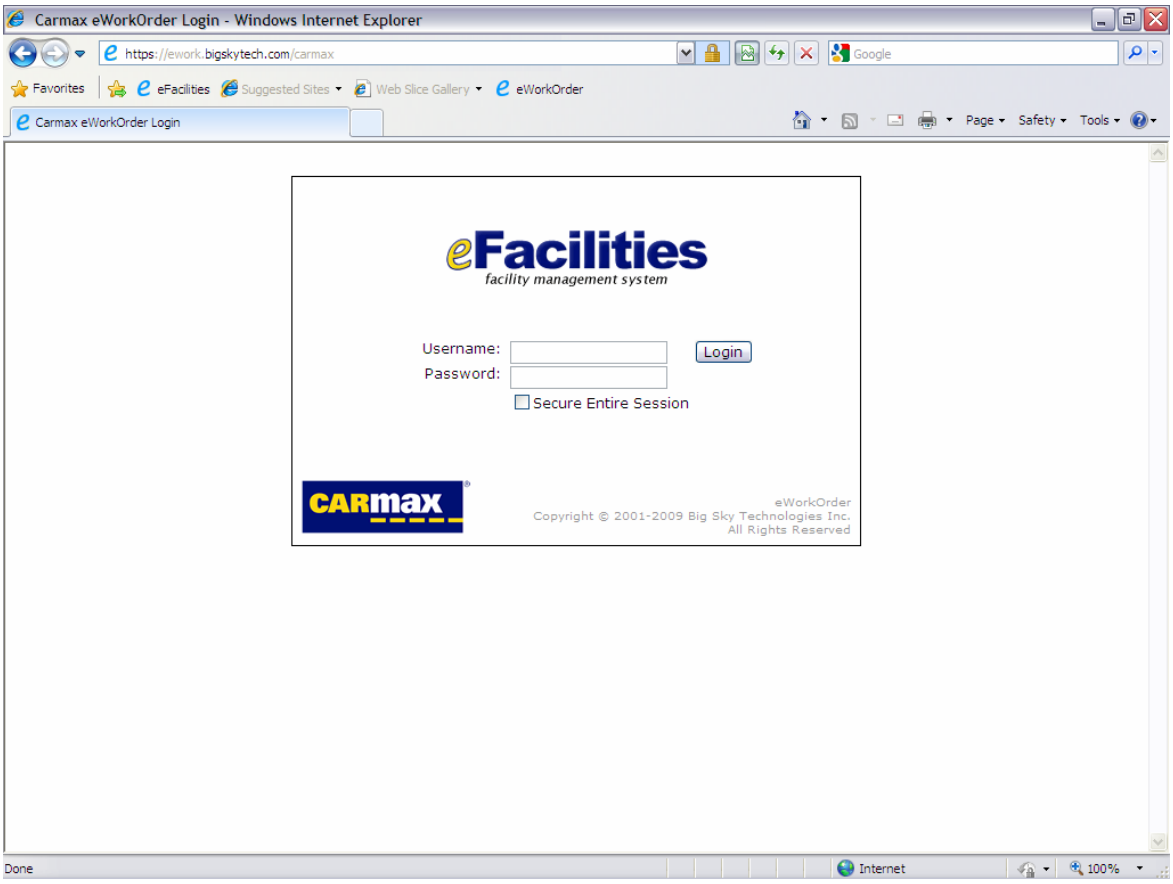

Figure 4 – Login Page

After logging into the system your home page is displayed. A Contractor's home page is displayed in figure 4. The format of the home page is configurable and all options displayed may not be available from your home page.

eFacilities maintains a web session with your browser after logging in. This session will be terminated after a period of inactivity and the login page will be redisplayed.

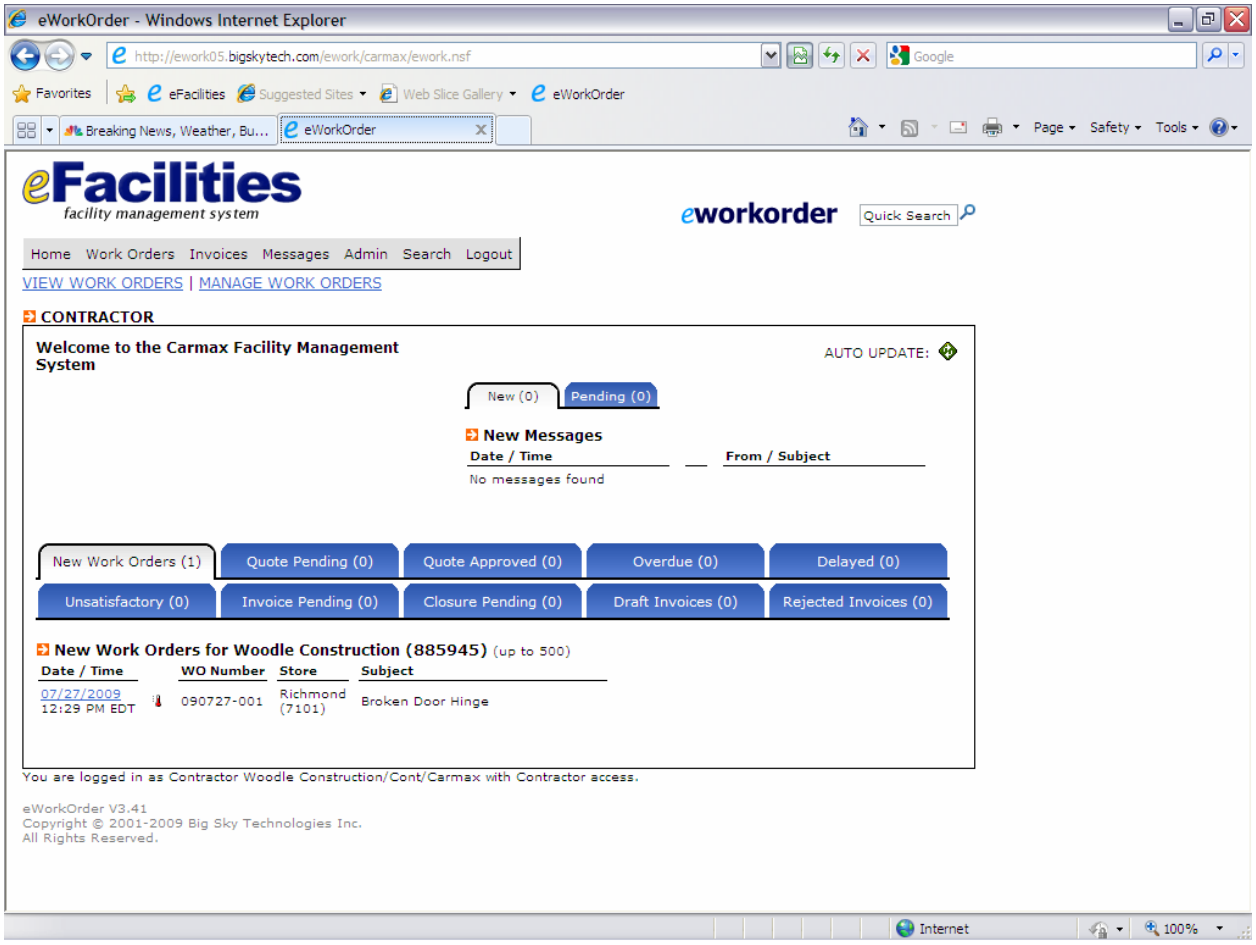
eWorkOrder - Windows Internet Explorer
eFacilities
facility management system
eworkorder
Quick Search
Home Work Orders Invoices Messages Admin Search Logout
VIEW WORK ORDERS | MANAGE WORK ORDERS
CONTRACTOR
Welcome to the Carmax Facility Management System
AUTO UPDATE:
New (0) Pending (0)
New Messages
Date / Time
From / Subject
No messages found
New Work Orders (1) Quote Pending (0) Quote Approved (0) Overdue (0) Delayed (0)
Unsatisfactory (0) Invoice Pending (0) Closure Pending (0) Draft Invoices (0) Rejected Invoices (0)
New Work Orders for Woodle Construction (885945) (up to 500)
Date / Time
WO Number
Store
Subject
07/27/2009 12:29 PM EDT
090727-001
Richmond (7101)
Broken Door Hinge
You are logged in as Contractor Woodle Construction/Cont/Carmax with Contractor access.
eWorkOrder V3.41
Copyright © 2001-2009 Big Sky Technologies Inc.
All Rights Reserved.

Figure 5 – Contractor Home Page

Menu

The menu is displayed below the company logo. To select an option from the menu click the main menu item and then select the option from the drop down menu. The following main menu items are typically available:

Home - Home displays the Home page. Clicking the company's logo in the top left portion of the page also displays the Home page.

Work Orders – The Work Orders menu provides options to sort and view the current Work Orders and manage and update existing Work Orders through the 'Manage Work Order' and 'Bulk Status Update' options. Refer to Updating Work Orders section for more information.

Invoices –The Invoice menu provides options to view Invoices.

Messages – The Messages menu provides options to view Messages.

Admin – The Admin menu provides the option to change the user password and to submit invoices by importing an invoice spreadsheet. Refer to page **Error! Bookmark not defined.** for more information on importing consolidated invoice spreadsheets.

Search – The Search menu presents a list of all of the document types available for detailed searching. Refer to page 13 for more information on searching.

Logout –Logout ends your eFacilities session and displays the Login page.

Task Bar

Task bar options are available from the Home Page to provide easy access to features used most often. A single click on one of the task bar links displays the related page. The following options are typically available from the Home Page.

VIEW WORK ORDERS – Same as Work Orders\By Date from the Work Order Menu.

MANAGE WORK ORDERS – Same as Manage Work Orders from the Work Order menu.

The following task bar options are available when maintenance documents are opened. A single click on one of the task bar links performs the described action.

SAVE – Saves changes to the current document.

SAVE AND CLOSE – Saves and then closes the current document.

CLOSE – Closes the current document.

PRINT – Displays the browser's print dialog.

Message List

New message that have been sent to you are listed on the home page under the 'New' folder tab in the Message List. Once the message has been read, the message can be marked pending for further follow-up, or can be marked as reviewed. Pending messages are displayed under the 'Pending' folder tab. Messages marked as reviewed are no longer displayed in the Message List. Reviewed messages are saved and are displayed within the document where they were created. Reviewed messages can also be displayed by using the Message views available from the Menu. Refer to the Workflow Communication section on page 26 for more information on messages.

Tabs

The folder tabs displayed on the eFacilities home page provide a quick view of the Work Orders or Invoices that need attention. Click the tab headings to view the Work Order or Invoice documents listed under each category. The tabs do not provide access to all Work Orders or Invoices. You should use the views from the menu, or the search capability to find and manage other Work Orders and Invoices. The specific tabs available are based on system configuration settings.

New Work Orders – Work Orders that have been assigned to you but have not been acknowledged.

Quote Pending – Work Orders that are waiting for a quote from you.

Quote Approved – Work Orders that include quotes that have been approved by the Facility Coordinator and are ready to be completed.

Quote Overdue – Work Orders that have not had a quote submitted on time.

Overdue – Work Orders that have not been Acknowledged, Started or Completed on time.

Delayed – Work Orders that have a status of Delayed.

Unsatisfactory – Work Orders that have been rated Unsatisfactory.

Invoice Pending – Work Orders that are ready to be invoiced.

Closure Pending – Work Orders that have not been completed but are due to be closed by the system within 30 days.

Rejected Invoices – Invoices that have been rejected by the Facility Coordinator.

Draft Invoices – Invoices that have been saved as "Draft" and have not been entered for processing.

Auto Update

The "**AUTO UPDATE**" icon button is used to enable or disable automatic screen refresh. Clicking the icon button will toggle the feature between "on", indicated by green, and "off", indicated by red. Enabling automatic refresh will update the Message and Tab lists automatically and prevent the session from timing out.

View Work Orders or Invoices

Work Orders can be viewed by date, type, store number, status and priority while Invoices can be viewed by date, status, Work Order number or Invoice number. When a view is displayed, links are available to open the Work Order or Invoice.

1. **Click "Work Orders"** or **"Invoices"** from the menu.
2. **Click** the method to view the documents in the drop down list.

Clicking the "**VIEW WORK ORDERS"** Task Bar link is the same as selecting the Work Orders\By Date view from the Work Orders Menu.

Work Order or Invoice documents can be opened by clicking the associated link from the view. Views may contain category headings in bold font that can be expanded and collapsed by clicking the triangle next to the heading. The priority of the maintenance document is identified in the view by the following icons:

Standard (2 weeks)
Intermediate (24-72 hours)
Urgent (Same Day)
Emergency (2-4 hours)

Navigation command links are located at the top and bottom of the view list:

COLLAPSE – If the view is categorized, the view is redisplayed showing only the categories in the first column. The number of documents in each category is also displayed.

EXPAND – If the view is categorized, the view is redisplayed showing all categories and documents.

PREVIOUS – The previous set of documents in the view are displayed.

NEXT – The next set of documents in the view are displayed.

REFRESH – The same view is redisplayed showing updated information.

To open a document from a view list, click on the blue Work Order reference number link or the blue Invoice number link.

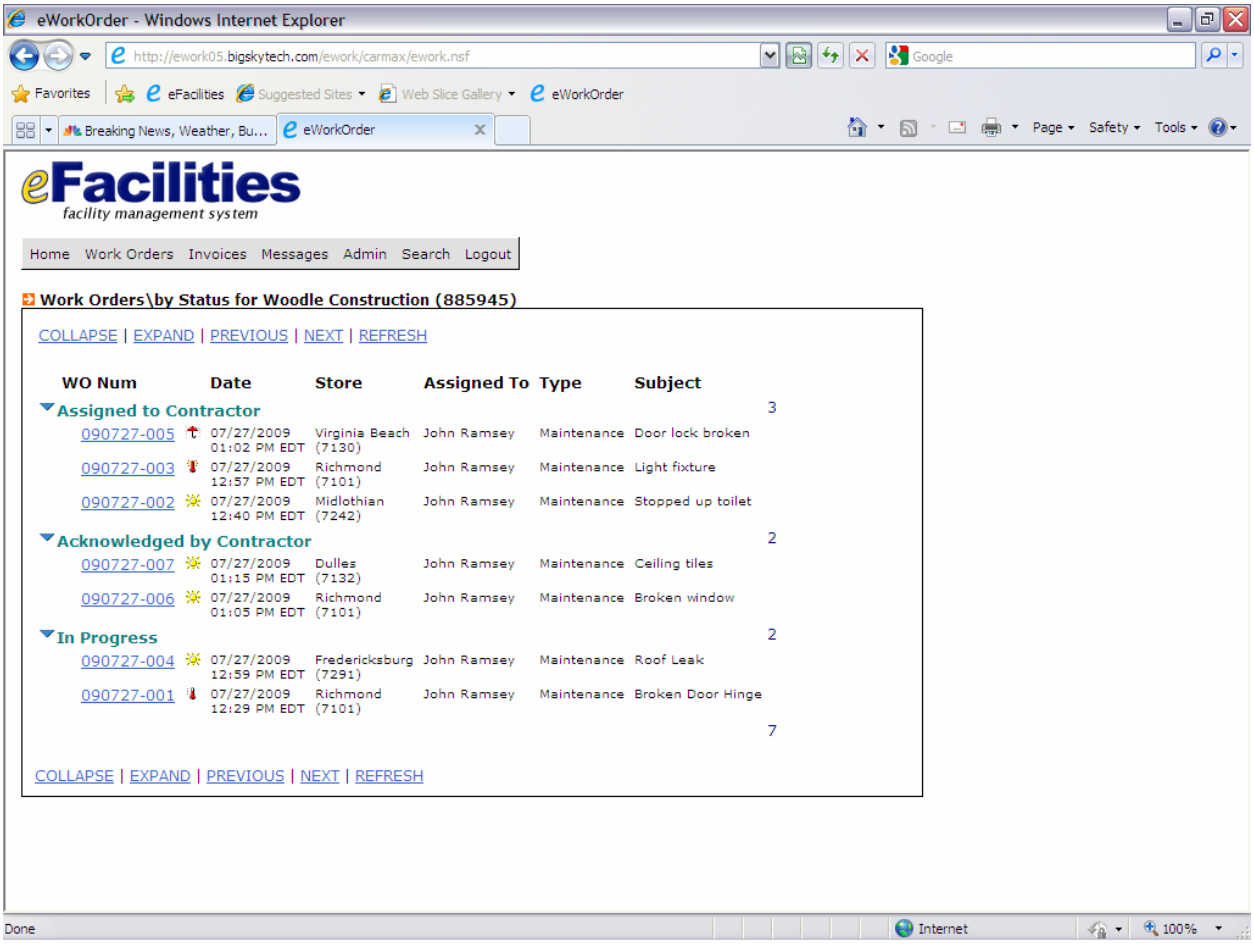
eWorkOrder - Windows Internet Explorer
eFacilities
facility management system
Home Work Orders Invoices Messages Admin Search Logout
Work Orders\by Status for Woodle Construction (885945)
COLLAPSE | EXPAND | PREVIOUS | NEXT | REFRESH
WO Num Date Store Assigned To Type Subject
Assigned to Contractor 3
090727-005 07/27/2009 01:02 PM EDT Virginia Beach (7130) John Ramsey Maintenance Door lock broken
090727-003 07/27/2009 12:57 PM EDT Richmond (7101) John Ramsey Maintenance Light fixture
090727-002 07/27/2009 12:40 PM EDT Midlothian (7242) John Ramsey Maintenance Stopped up toilet
Acknowledged by Contractor 2
090727-007 07/27/2009 01:15 PM EDT Dulles (7132) John Ramsey Maintenance Ceiling tiles
090727-006 07/27/2009 01:05 PM EDT Richmond (7101) John Ramsey Maintenance Broken window
In Progress 2
090727-004 07/27/2009 12:59 PM EDT Fredericksburg (7291) John Ramsey Maintenance Roof Leak
090727-001 07/27/2009 12:29 PM EDT Richmond (7101) John Ramsey Maintenance Broken Door Hinge
7
COLLAPSE | EXPAND | PREVIOUS | NEXT | REFRESH

Figure 6 – Work Order \ by Status View

Search for a Work Order or Invoice

There are two search options available to search for a Work Request or Work Order: Quick Search and Full Text Search. **Quick Search** is available in the upper right hand corner of the Home page. Enter a Work Order number to open the specified document. For example, entering 090317-003 will open and display Work Order number 090317-003.

Click "Search" on the menu to conduct a **Full Text Search**. The full text search option allows you to perform a comprehensive search of the eFacilities system for Work Orders and Invoices. A search screen is displayed below. Each search screen displays a variety of fields for the selected document

type. The search options are configured by the System Administrator and not all fields displayed below may be available.

The Search Filters section filters the search results based on the options selected. The Keyword search field searches across all fields within the target document for the entered words. You can use AND and OR between words in the Keyword search field to control which documents are selected by the search. For example, entering "door AND key" finds all documents that have both words somewhere in the document. The Limit Results section limits the results by date and dollar amounts. The Output Options section defines the output format, number of results and sorting order.

To save your selected search options, enter a name for the search template at the top of the search form. The search parameters are saved in the template and can be selected again at any time in the drop down list. Selecting a saved search automatically populates the form with the saved selections.

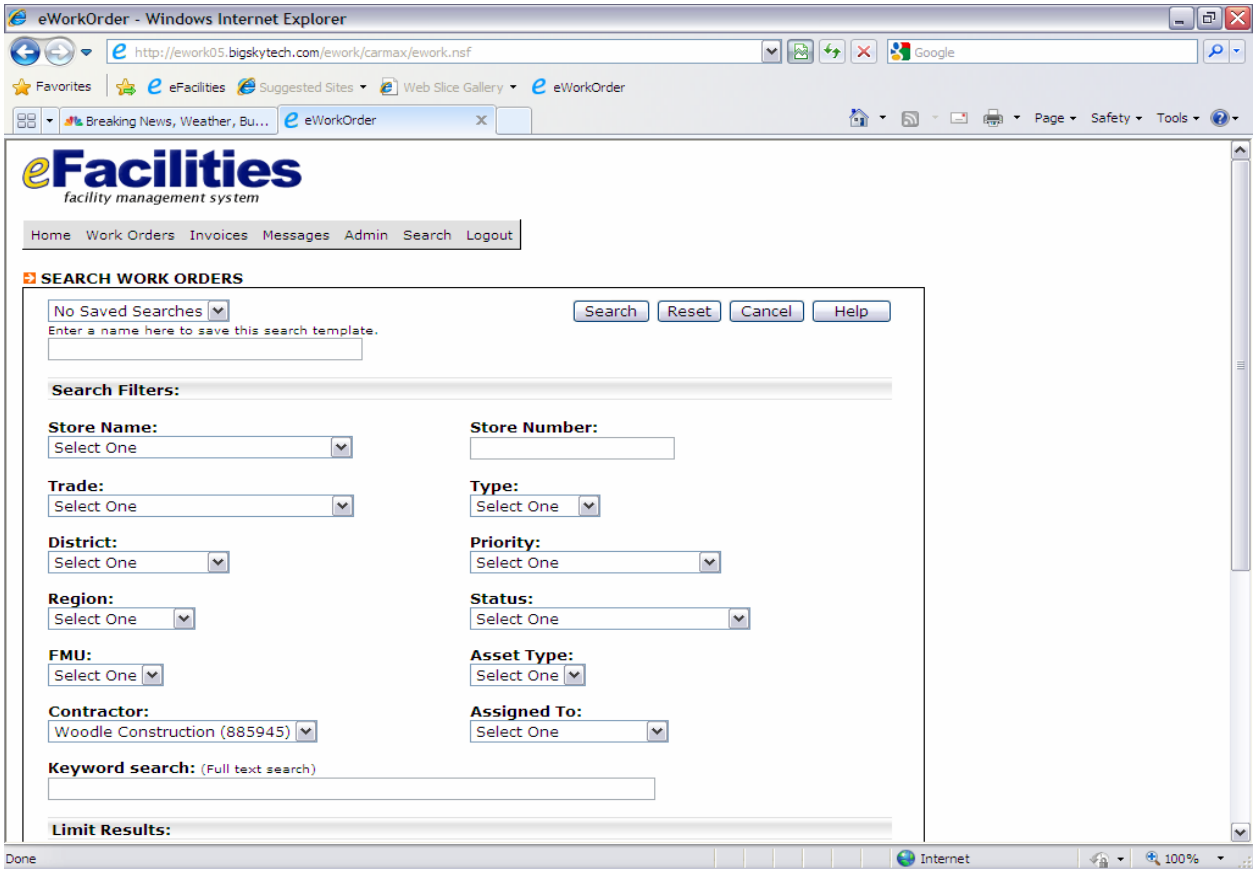

Figure 7 - Search Work Orders

Workflow Procedures

This section describes how to perform the maintenance workflow procedures from the eFacilities Web Interface.

Review a New Work Order

The status of a New Work Order assigned to you is "Assigned to Contractor" and the Work Order is listed under the **New Work Orders** tab on your home page. Open the Work Order, review the service requested and determine the appropriate action.

1. **Click** "**New Work Orders**" tab on the Home page. This displays all new Work Orders that are assigned to you.
2. **Click the blue date link** of the Work Order to be reviewed. This will open the Work Order.
3. **Review** the Work Order information including Requester, Subject and Request, Scheduled Completion Date and NTE (Not to Exceed) Cost.
4. **Determine Action:**
   - Accept the work order as defined. (See Acknowledge Work Order, Page 16)
   - Accept the work order with a new completion date. (See Acknowledge Work Order, Page 16)
   - Decline the work order. (See Decline Work Order, Page 17)
   - Cost exceeds NTE. (See Generate Quote, Page 18 and Submit Quote for Review, Page 19)
   - Accept the Work Order and indicate work has started. (See Indicate Work In Progress, Page 20)

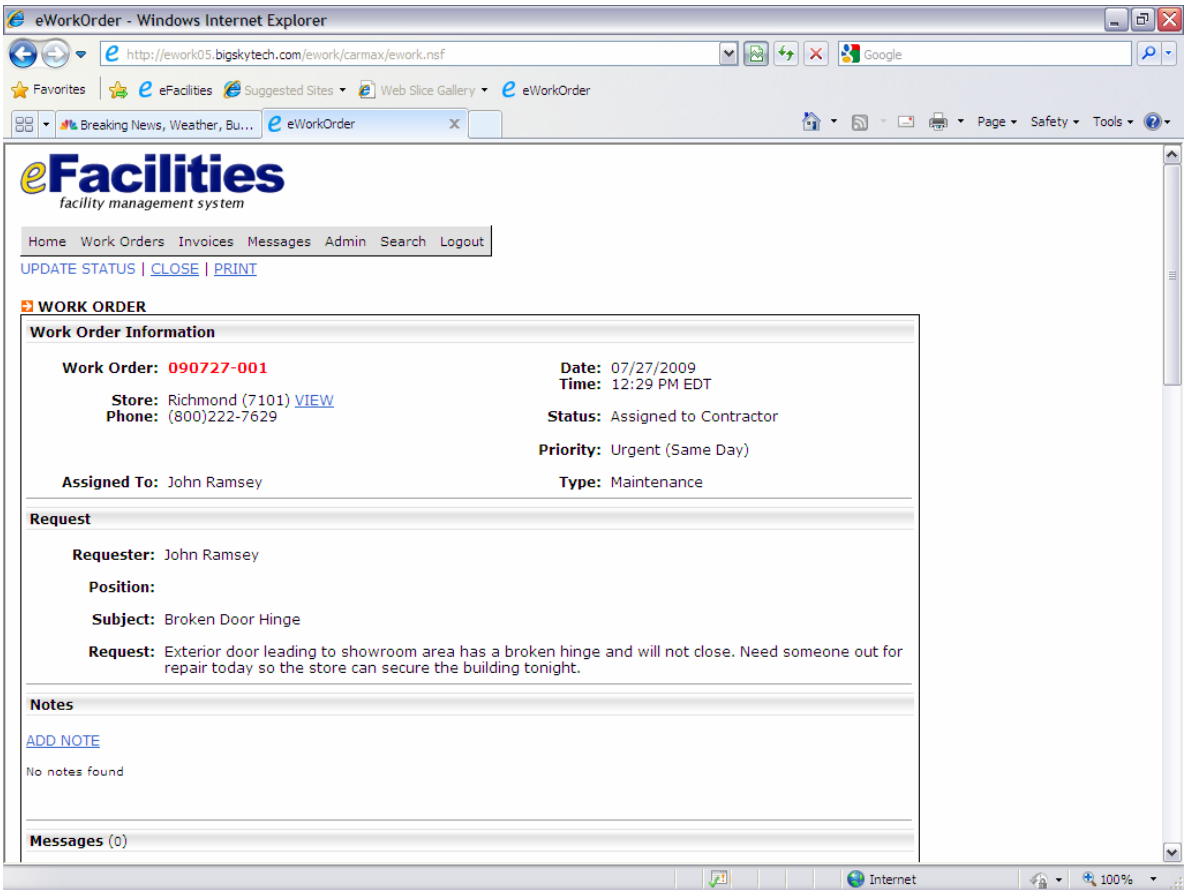
eWorkOrder - Windows Internet Explorer
http://ework05.bigskytech.com/ework/carmax/ework.nsf
eFacilities
facility management system
Home Work Orders Invoices Messages Admin Search Logout
UPDATE STATUS | CLOSE | PRINT
WORK ORDER
Work Order Information
Work Order: 090727-001
Date: 07/27/2009
Time: 12:29 PM EDT
Store: Richmond (7101) VIEW
Phone: (800)222-7629
Status: Assigned to Contractor
Priority: Urgent (Same Day)
Assigned To: John Ramsey
Type: Maintenance
Request
Requester: John Ramsey
Position:
Subject: Broken Door Hinge
Request: Exterior door leading to showroom area has a broken hinge and will not close. Need someone out for repair today so the store can secure the building tonight.
Notes
ADD NOTE
No notes found
Messages (0)

Figure 8 – Review New Work Order

Acknowledge Work Order

The status of a New Work Order assigned to you is "Assigned to Contractor" and the Work Order is listed under the **New Work Orders** tab on your home page. Change the status of the Work Order to "Acknowledged by Contractor" to accept the Work Order. Changing the status can be done within the Work Order.

1. **Click** "**UPDATE STATUS**" in the task bar.
2. **Click on the current status** "Assigned to Contractor" to display the pull-down status selection list.
3. **Select "Acknowledged by Contractor"** to update the status.
4. If the Estimated Completion Date needs to be updated, type in a new date with format MM/DD/YYYY or click the blue calendar link to display a pop-up calendar.
5. **Include a Note regarding the change in status or change in date.** This will be included in the Notes section of the Work Order document.
6. **Click the "Update"** button to save the changes and close the window.

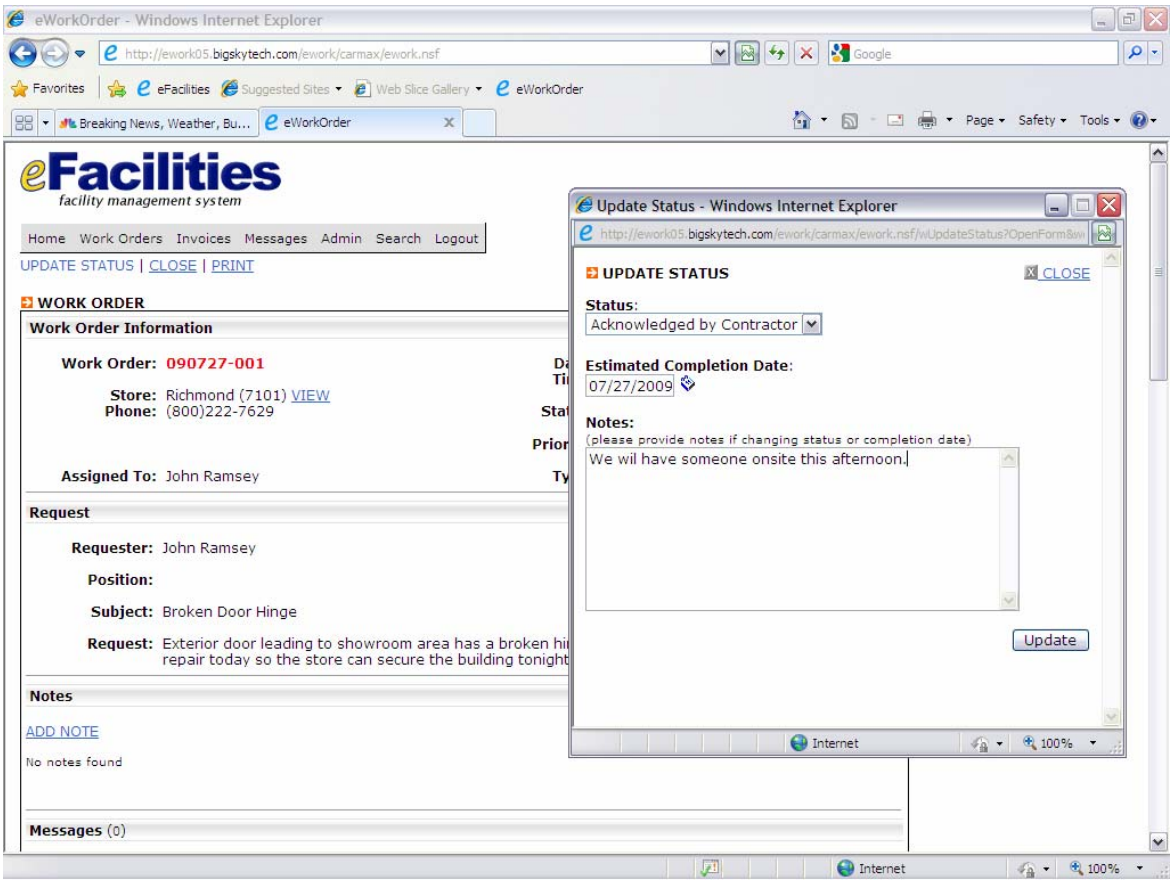

Figure 9 – Accept Work Order

Decline Work Order

The status of a New Work Order assigned to you is "Assigned to Contractor" and the Work Order is listed under the **New Work Orders** tab on your home page. Change the status of the Work Order to "Declined" to decline the Work Order. Changing the status can be done within the Work Order.

1. **Click** "**UPDATE STATUS**" in the task bar.
2. **Click on the current status** "Assigned to Contractor" to display the pull-down selection list.
3. **Select "Declined"** to update the status.
4. **Include a Note regarding the reason for declining the Work Order.** This will be included in the Notes section of the Work Order document.
5. **Click the "Update"** button to save the changes and close the window.

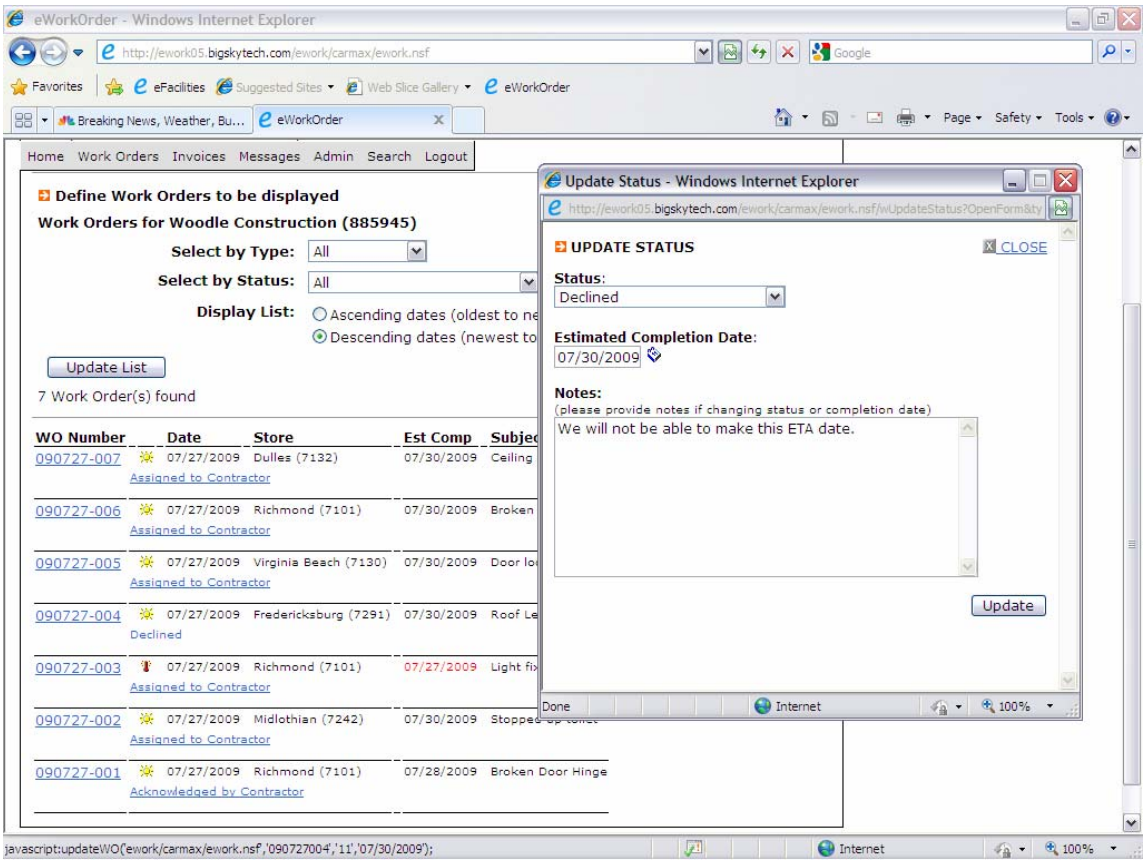

Figure 10 – Decline Work Order

Generate Quote

If you determine that the cost of the work will exceed the NTE (Not to Exceed) amount in the Cost Section of the Work Order you can elect to submit a new quote detailing the new cost amount. Change the status of the Work Order to "Quote Pending" to indicate that you are preparing a quote. Changing the status can be done within the Work Order. Work Orders with a status of "Quote Pending" are listed under the **Quote Pending** tab on your home page.

1. **Click** "**UPDATE STATUS**" in the task bar.
2. **Click on the current status** "Assigned to Contractor" to display the pull-down selection list.
3. **Select "Quote Pending"** to update the status.
4. **Include an optional note.**
5. **Click the "Update"** button to save the changes and close the window.

After you change the Work Order status to "Quote Pending", you have a limited time to submit the quote before the Work Order is marked as Quote Overdue. The default time is 72 hours.

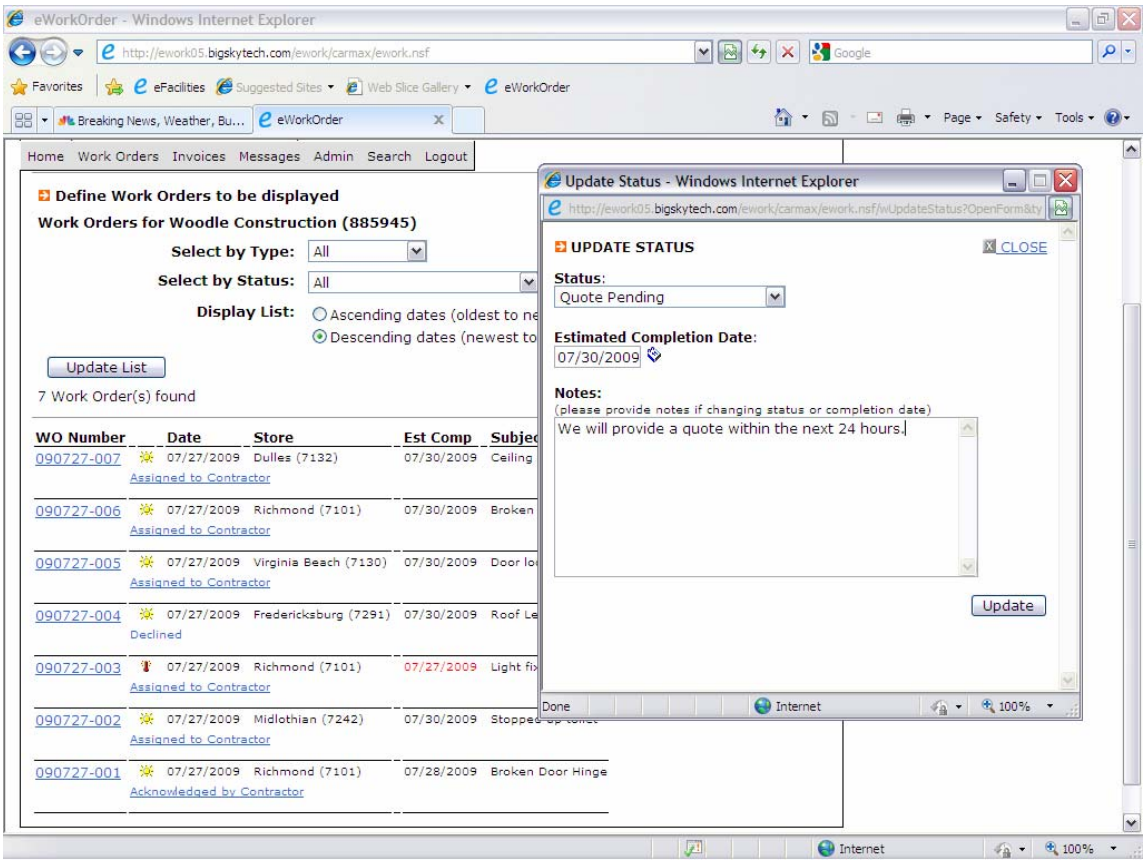
eWorkOrder - Windows Internet Explorer
Home Work Orders Invoices Messages Admin Search Logout
Define Work Orders to be displayed
Work Orders for Woodle Construction (885945)
Select by Type: All
Select by Status: All
Display List:
Update List
7 Work Order(s) found
WO Number Date Store Est Comp
090727-007 07/27/2009 Dulles (7132) 07/30/2009 Ceiling
Assigned to Contractor
090727-006 07/27/2009 Richmond (7101) 07/30/2009 Broken
Assigned to Contractor
090727-005 07/27/2009 Virginia Beach (7130) 07/30/2009
Assigned to Contractor
090727-004 07/27/2009 Fredericksburg (7291) 07/30/2009 Roof Le
Declined
090727-003 07/27/2009 Richmond (7101) 07/27/2009 Light fi
Assigned to Contractor
090727-002 07/27/2009 Midlothian (7242) 07/30/2009
Assigned to Contractor
090727-001 07/27/2009 Richmond (7101) 07/28/2009 Broken Door Hinge
Acknowledged by Contractor
Update Status - Windows Internet Explorer
UPDATE STATUS
CLOSE
Status:
Quote Pending
Estimated Completion Date:
07/30/2009
Notes:
(please provide notes if changing status or completion date)
We will provide a quote within the next 24 hours.
Update
Done
Internet
100%

Figure 11 – Preparing a Quote

Submit Quote for Review

A Quote is required when the cost of the work exceeds the NTE (Not to Exceed) amount defined in the Work Order. Submit the Quote for review by attaching a prepared quote file to the associated Work Order and updating the Work Order status to "Review Required".

1. **Click** "**Quote Pending**" tab on the Home page. This displays all Work Orders that require a prepared quote.
2. **Click the blue date link** of the Work Order to open the work order, if not already open.
3. **Attach the Quote** in the attachments section of the work order (refer to Attach a File in the Workflow Communication section on page 32)
4. **Click** "**UPDATE STATUS**" in the task bar.
5. **Click on the current status** "Quote Pending" to display the pull-down selection list.
6. **Select "Review Required"** to update the status.
7. **Click the "Update"** button to save the changes and close the window.

It is usually a good idea to send a Message to the Facility Coordinator assigned to the Work Order. Please see page 26 for details on creating and sending a Message.

Review Approved Quote

Quotes that have been submitted and approved are listed under the **Quote Approved** tab on your home page. The NTE amount is adjusted based on your quote and the status of the Work Order is 'Quote Approved'. Once work is started, update the status of the Work Order to 'In Progress' and provide an updated Estimated Completion Date.

Indicate Work In Progress

Update the Work Order status to "In Progress" when you begin or resume work on a Work Order.

1. **Open Work Order.**
2. **Click** "**UPDATE STATUS**" in the task bar.
3. **Click on the current status** to display the pull-down status selection list.
4. **Select "In Progress"** to update the status.
5. **Click the "Update"** button to save the changes and close the window.

Indicate Work Delayed

Submit a new date and update the Work Order status to "Delayed" if you determine that the Estimated Completion Date cannot be met. Delayed Work Orders are listed under the **Delayed** tab on your home page.

1. **Open Work Order.**
2. **Click** "**UPDATE STATUS**" in the task bar.
3. **Click on the current status** to display the pull-down status selection list.
4. **Select "Delayed"** to update change the status.
5. **Select a Delay Reason** if this field is displayed (this feature is optional and may not be displayed).
6. **Enter the new Estimated Completion Date**. Type in a new date with format MM/DD/YYYY or click the blue calendar link to display a pop-up calendar.
7. **Add a Note regarding the reason for the delay**. This will be included in the Notes section of the Work Order document.
8. **Click the "Update"** button to save the changes and close the window.

Indicate Work Complete

Update the Work Order status to "Contractor Done" when you complete a Work Order.

1. **Open Work Order.**
2. **Click** "**UPDATE STATUS**" in the task bar.
3. **Click on the current status** to display the pull-down status selection list.
4. **Select "Contractor Done"** to update the status.
5. **Click the "Update"** button to save the changes and close the window.

Review Unsatisfactory Work

If there was a problem with the work, the status of the Work Order is changed to "Unsatisfactory" and the Work Order is displayed in the **Unsatisfactory** tab on the Facility Coordinator's, Store Manager's and Contractor's home pages. While a Work Order has a status of "Unsatisfactory", Invoices associated with the Work Order will not be approved. Work with the Store Manager and Facility Coordinator to rectify any problems. Once the problem is resolved, the Store can change the status to "Completed" and the associated Invoice can be processed.

Review Overdue Work Orders

A Work Order that has not transitioned to the next state in the workflow process within a configurable amount of time is marked as overdue and the Work Order is listed under the **Overdue** tab on your home page. Work Orders are considered overdue under the following conditions:

1. **Work Order Not Acknowledged**. If a Work Order is not acknowledged or declined within a certain amount of time after being assigned to you, the Work Order is marked as overdue for acknowledgement and you will receive an alert. The default settings for this option are based on the priority of the Work Order and are 2 hours for emergencies, 8 hours for high and 24 hours for medium and low priority Work Orders.

   The status of the Work Order must be updated to remove the Work Order from this tab.

2. **Work Not Started.** If the status of a Work Order is not updated to "In Progress" within a certain amount of time after being assigned to you, the Work Order is marked as overdue for work start and you will receive an alert. The default settings for this option are based on the priority of the Work Order and 4 hours for emergencies, 4 hours for high, and there is no time period for medium and low work orders.

   The status of the Work Order must be updated to remove the Work Order from this tab.

3. **Work Not Complete.** If the status of a Work Order is not updated to "Contractor Done" within a certain amount of time after the Work Order is created, the Work Order is marked as overdue for work start and you will receive an alert. The default settings for this option are based on the priority of the Work Order and are 4 hours for emergencies, 24 hours for high, and 72 hours medium and low work orders.

   The status of the Work Order must be updated to remove the Work Order from this tab.

Review Quote Overdue Work Orders

If the status of a Work Order is not updated to "Review Required" within a certain amount of time after the status is set to "Quote Pending", the Work Order is displayed in the Quote Overdue tab on your home page and will receive an alert. The default value for this timeframe is 72 hours. A Quote should be attached to the Work Order and the Status updated to Review Required to remove the Work Order from this tab.

Updating Work Orders

Manage Work Orders Screen

The Manage Work Orders screen is used to access and review Work Orders for a specific type or status and to quickly change the status or completion dates of any displayed Work Order. The Manage Work Order screen can also be used to add Invoices for a Work Order. To display the Manage Work Orders screen select **Work Orders > Manage Work Orders** from the home page menu.

The following filter options are available to define the Work Orders to be displayed. Click the "Update List" button to update the display.

Select by Type – Select the type of Work Orders to be displayed, or select "All" to display Work Orders for all types.

Select by Status – Select the status of the Work Orders to be displayed, or select "All" to display Work Orders for all status options.

Display List – Select Ascending to display the oldest Work Orders first, or select Descending to display the newest Work Orders first.

The resulting Work Orders are displayed with the Work Order number, priority icon, date created, Store name and number, scheduled completion date (shown in red if overdue), subject and status. Click the Work Order number link to open the Work Order.

Click the status link to display an Update Status window. The Update Status window is used to change the status, the scheduled completion date and to add a Note to the Work Order.

If the Work Order has a status of "In Progress", "Contractor Done" or "Completed" a link is available to add an Invoice for the Work Order. If a Work Order already has an Invoice associated with it, a link is provided to open the Invoice, and edit it if allowed.

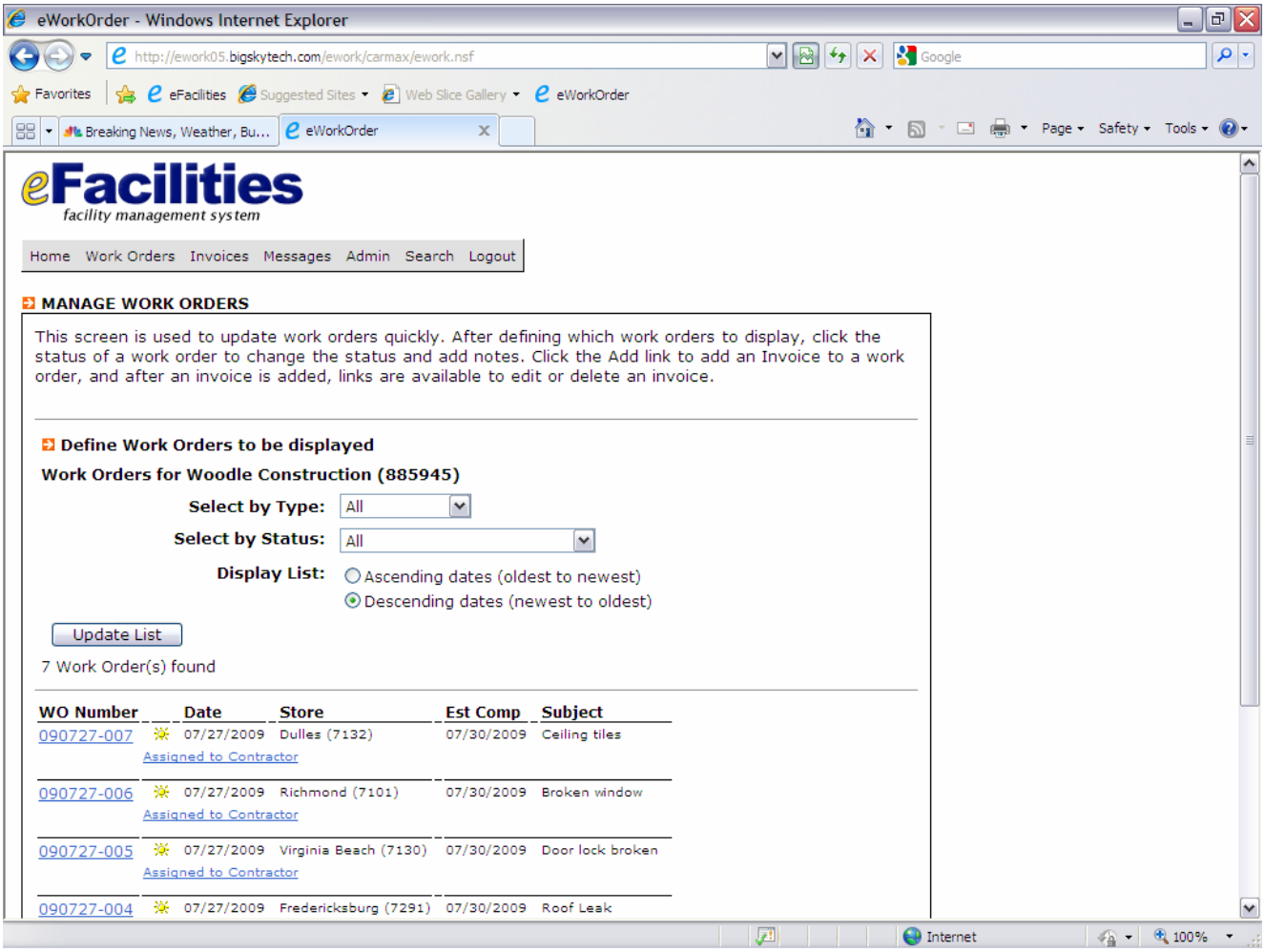
eWorkOrder - Windows Internet Explorer
http://ework05.bigskytech.com/ework/carmax/ework.nsf
eFacilities
facility management system
Home Work Orders Invoices Messages Admin Search Logout
MANAGE WORK ORDERS
This screen is used to update work orders quickly. After defining which work orders to display, click the status of a work order to change the status and add notes. Click the Add link to add an Invoice to a work order, and after an invoice is added, links are available to edit or delete an invoice.
Define Work Orders to be displayed
Work Orders for Woodle Construction (885945)
Select by Type: All
Select by Status: All
Display List: Ascending dates (oldest to newest) Descending dates (newest to oldest)
Update List
7 Work Order(s) found
WO Number Date Store Est Comp Subject
090727-007 07/27/2009 Dulles (7132) 07/30/2009 Ceiling tiles
Assigned to Contractor
090727-006 07/27/2009 Richmond (7101) 07/30/2009 Broken window
Assigned to Contractor
090727-005 07/27/2009 Virginia Beach (7130) 07/30/2009 Door lock broken
Assigned to Contractor
090727-004 07/27/2009 Fredericksburg (7291) 07/30/2009 Roof Leak

Figure 12 - Manage Work Orders

Update the Status of Multiple Work Orders

The Bulk Status Update screen is used to quickly locate and update the status of multiple Work Orders. To display the Bulk Status Update select **Work Orders > Bulk Status Update** from the home page menu.

The following filter options are available to define the Work Orders to be processed.

Select by Type – Select the type of Work Orders to be displayed, or select "All" to display Work Orders for all types.

Select by Status – Select the status of the Work Orders to be displayed. Work Order can only be displayed for a single status.

Display List – Select Ascending to display the oldest Work Orders first, or select Descending to display the newest Work Orders first.

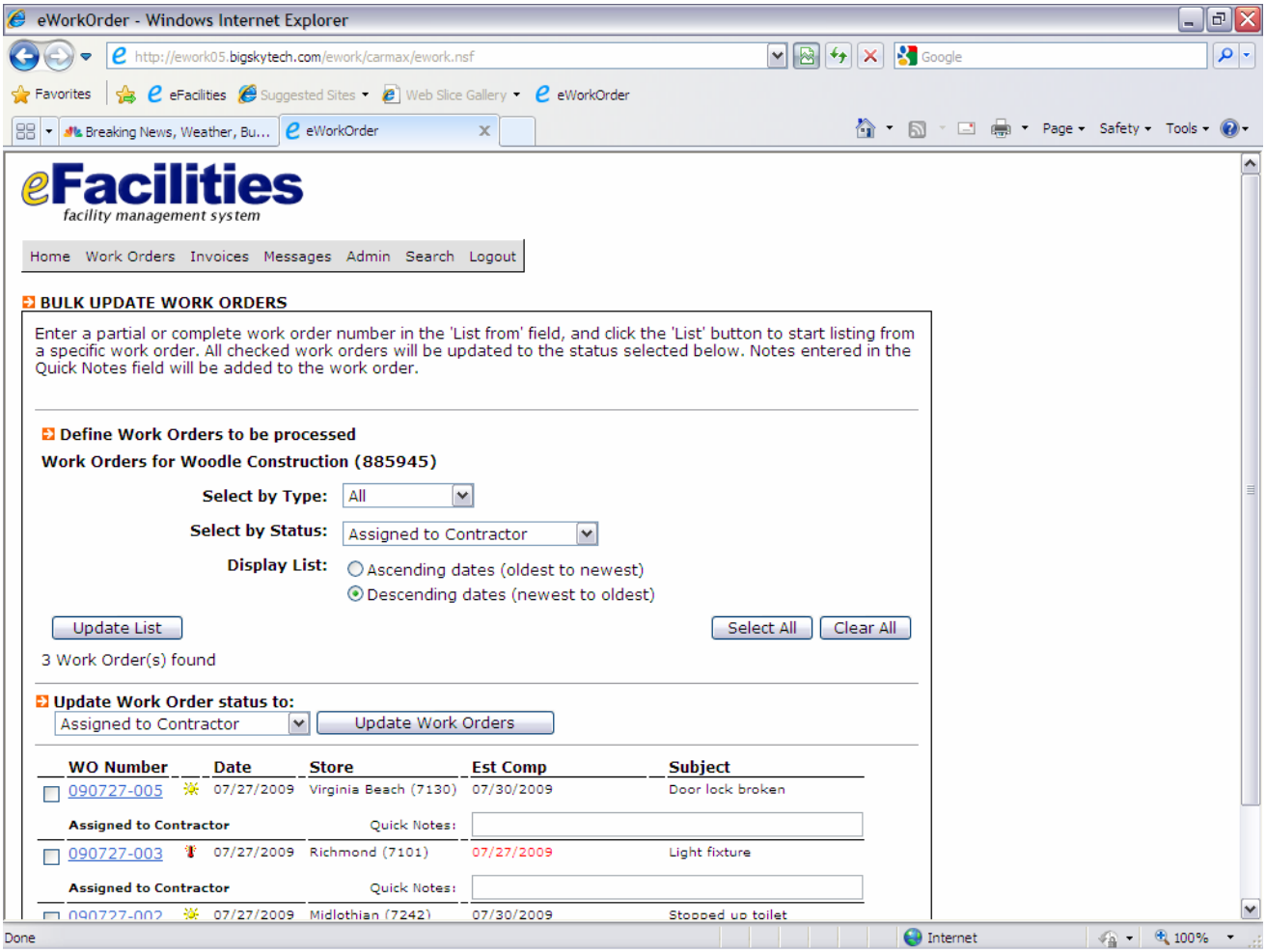

Figure 13 - Bulk Status Update

Click the "Update List" button to display a list of Work Orders based on the filters selected.

A checkbox is displayed for each Work Order allowing Work Orders to be selected for the status update. Directly above the Work Order list is a drop down field that determines the new status for the selected Work Orders. Clicking the "Update Work Orders" button will cause the selected Work Order to be updated.

A Quick Notes field is also provided for each Work Order, which is used to add a note to each of the selected Work Orders.

Clicking the "Select All" button selects all Work Orders, and the "Clear All" button clears all check boxes.

Invoices

Add an Invoice to a Work Order

Invoices can be created with a status of "Draft" or "Entered". When the status has been changed to "Entered" the Invoice is available for approval, and subsequent export to the Accounts Payable system. An invoice can be added to the Work Order as detailed below, or an Invoice can be added from the Manage Work Orders screen.

1. **Open the Work Order.** Click the blue creation date to open the Work Order.
2. **Click** "**ADD INVOICE**" in the Invoice section of the Work Order.
3. Enter the Invoice Number, Invoice Date, and the individual line items to complete the Invoice.
4. Click "**Save and Close**" to save the Invoice with a status of "Entered" making it available for approval. Click "**Save as Draft"** to save the Invoice with a status of "Draft", without making it available for approval. If the Invoice is saved as "Draft" you will need to reopen the Invoice from the Invoice section of the Work Order and update the Invoice by clicking the "Save and Close" button to allow the Invoice to be approved.

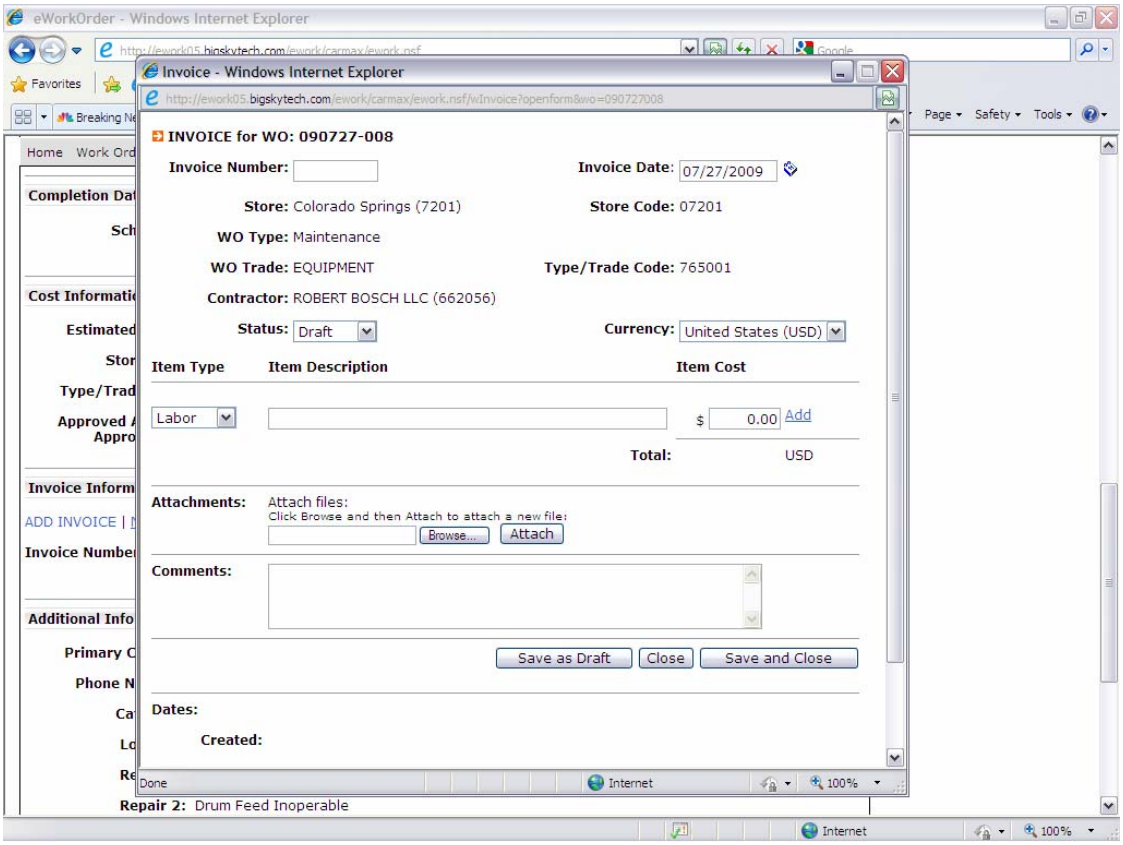

Figure 14 – Invoice Form

Workflow Communication

Throughout the maintenance workflow process, communication between users is accomplished through a messaging interface within the eFacilities system. Messages are displayed on the eFacilities home page of the recipient. New messages are displayed under the 'New' folder tab. Messages that have been marked for follow-up are displayed under the 'Pending' tab. Messages are also saved and displayed within the document where they were created. Messages that have been reviewed are displayed under the message view options from the menu.

Additional communication during the maintenance workflow is accomplished through note and file attachments within the maintenance documents.

Send a Message

Messages can be created from within Work Orders.

1. Click "**SEND MESSAGE**" within the Work Order to display the Message form.
2. **To**. This read only field is the assigned Facility Coordinator for the store.
3. **From**. This read only field includes the sender's name.
4. **Status**. The current status of the Message. This field displays "New" for new Messages.
5. Enter **Subject**. Enter a subject for the Message. This subject is displayed within the Work Request, Work Order and on the home page of the recipient.

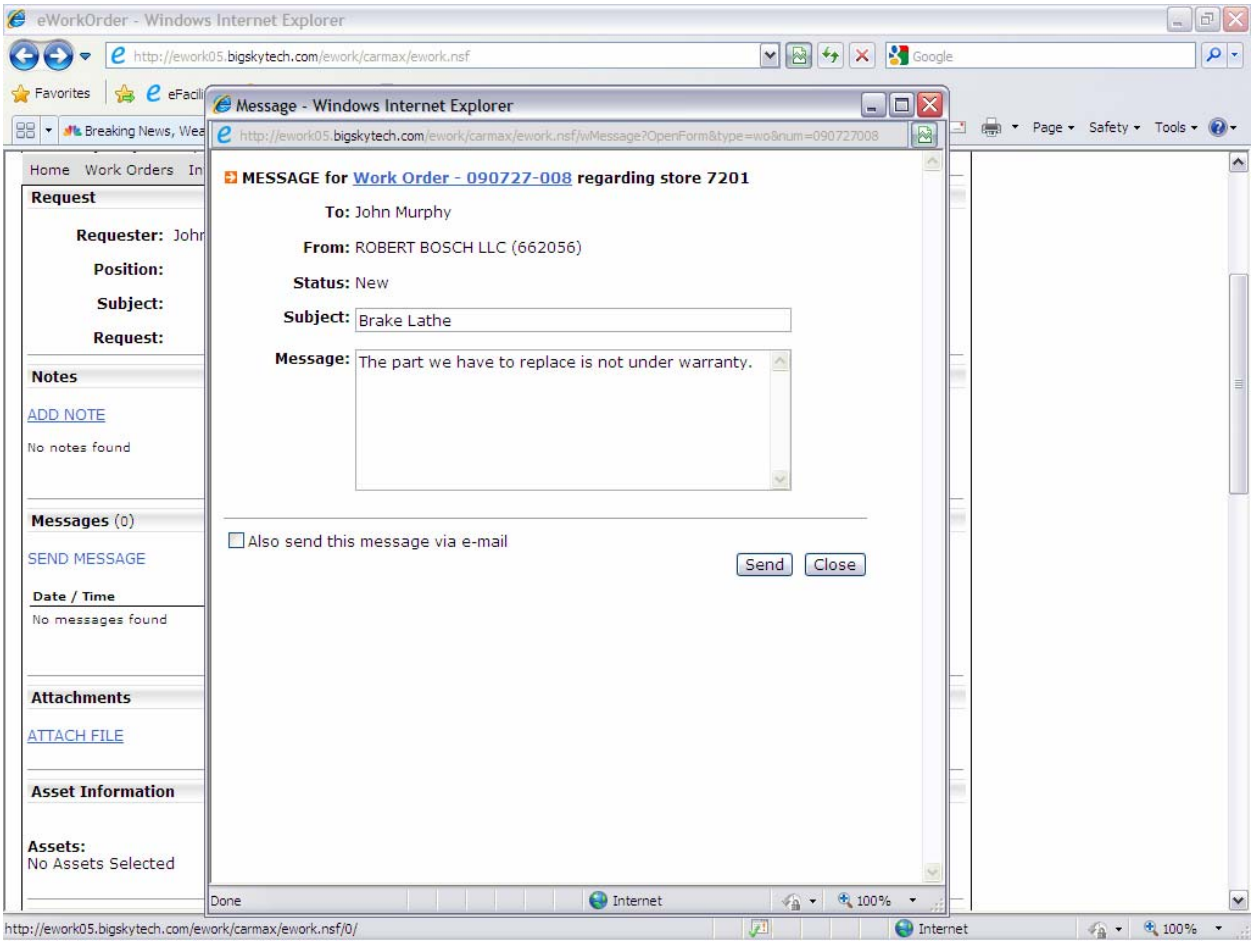

Figure 15 – Send a Message

6. Enter **Message**. Enter the Message text. Include as much detail as needed.
7. **Also send this Message via e-mail**. Select this option to have a copy of this Message sent to the recipient of the Message via e-mail.
8. Click "**Send**" to send the Message.

Review New Message

When another user sends you a Message it is displayed under the 'New' folder tab in the Message section of your home page. Select the 'New' Folder tab and click the Message link to display and read the Message. If the Message was created from a phone, a phone icon will be displayed. Clicking on the phone icon initiates the audio player to allow you to listen to the Message.

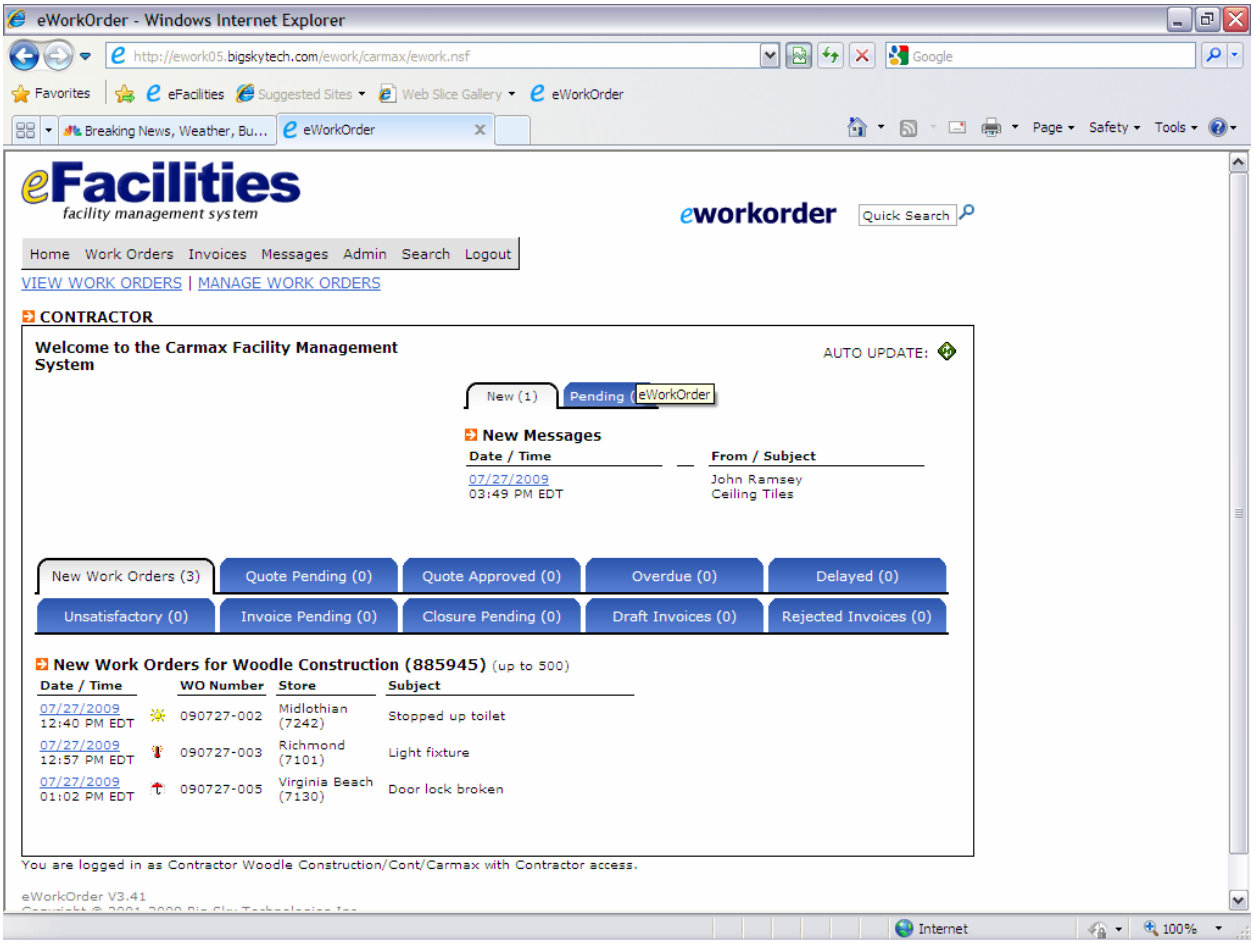

Figure 16 – New Messages

Once the message has been read, the message can be marked pending for further follow-up, or can be marked as reviewed. Click on the “Pending” or “Reviewed” button to change the message status. “Pending” messages are displayed under the ‘Pending’ folder tab in the Message section of your home page. “Reviewed” messages are no longer displayed in the Message list on the home page. Messages with a status of “Reviewed” can be displayed from the Message views available from the Menu.

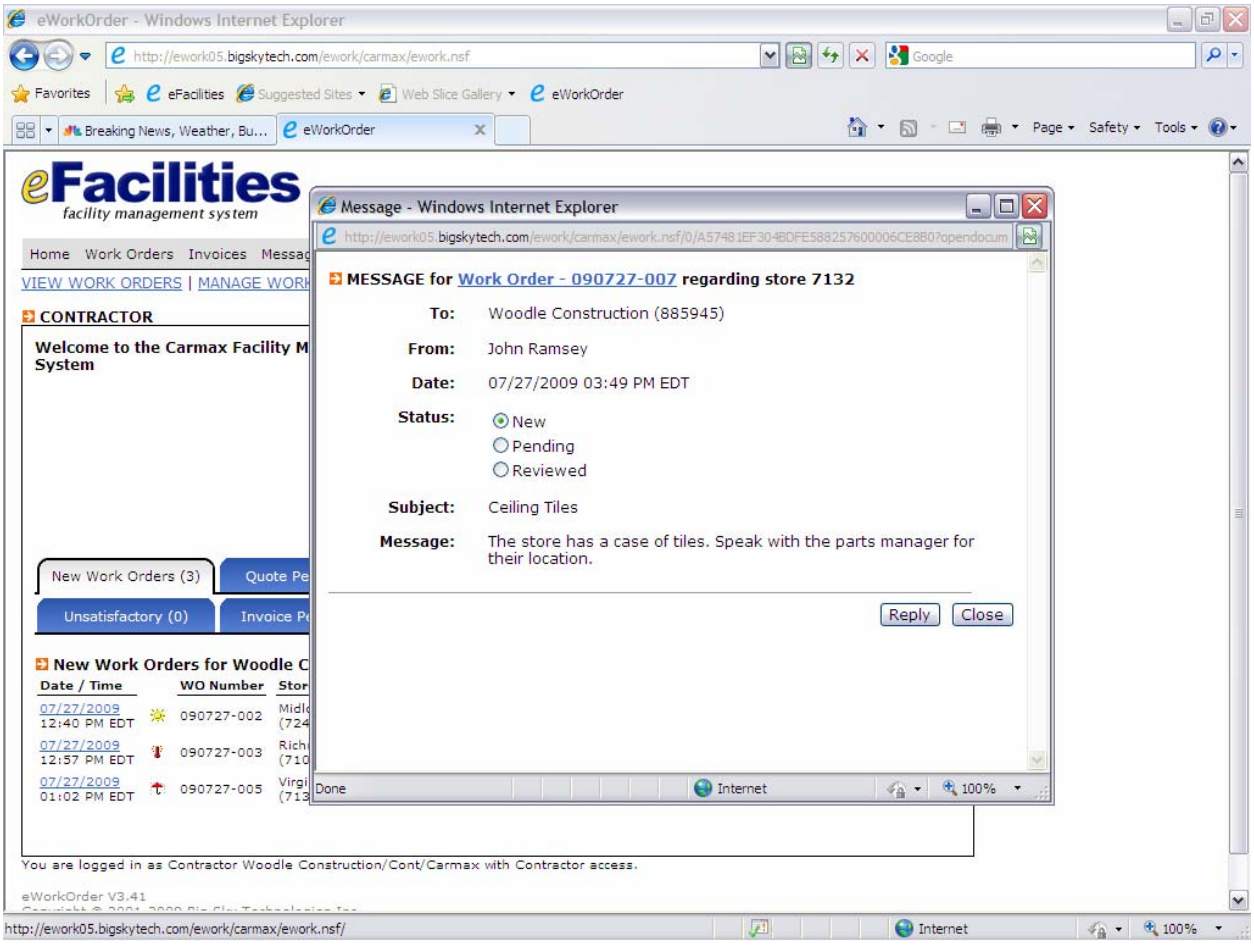
eWorkOrder - Windows Internet Explorer
eFacilities
facility management system
Message - Windows Internet Explorer
MESSAGE for Work Order - 090727-007 regarding store 7132
To: Woodle Construction (885945)
From: John Ramsey
Date: 07/27/2009 03:49 PM EDT
Status: New Pending Reviewed
Subject: Ceiling Tiles
Message: The store has a case of tiles. Speak with the parts manager for their location.
Reply
Close
CONTRACTOR
New Work Orders (3)
Unsatisfactory (0)
New Work Orders for Woodle C
Date / Time
WO Number
07/27/2009 12:40 PM EDT 090727-002
07/27/2009 12:57 PM EDT 090727-003
07/27/2009 01:02 PM EDT 090727-005
You are logged in as Contractor Woodle Construction/Cont/Carmax with Contractor access.
eWorkOrder V3.41

Figure 17 – Received Message

Review Pending Message

Messages that have been marked for follow-up, by setting the status to pending, are displayed under the 'Pending' folder on your home page. Select the 'Pending' Folder tab and click the Message link to display and read the Message. Click on the "Reviewed" button to change the message status, or leave the status as "Pending" if further action is required.

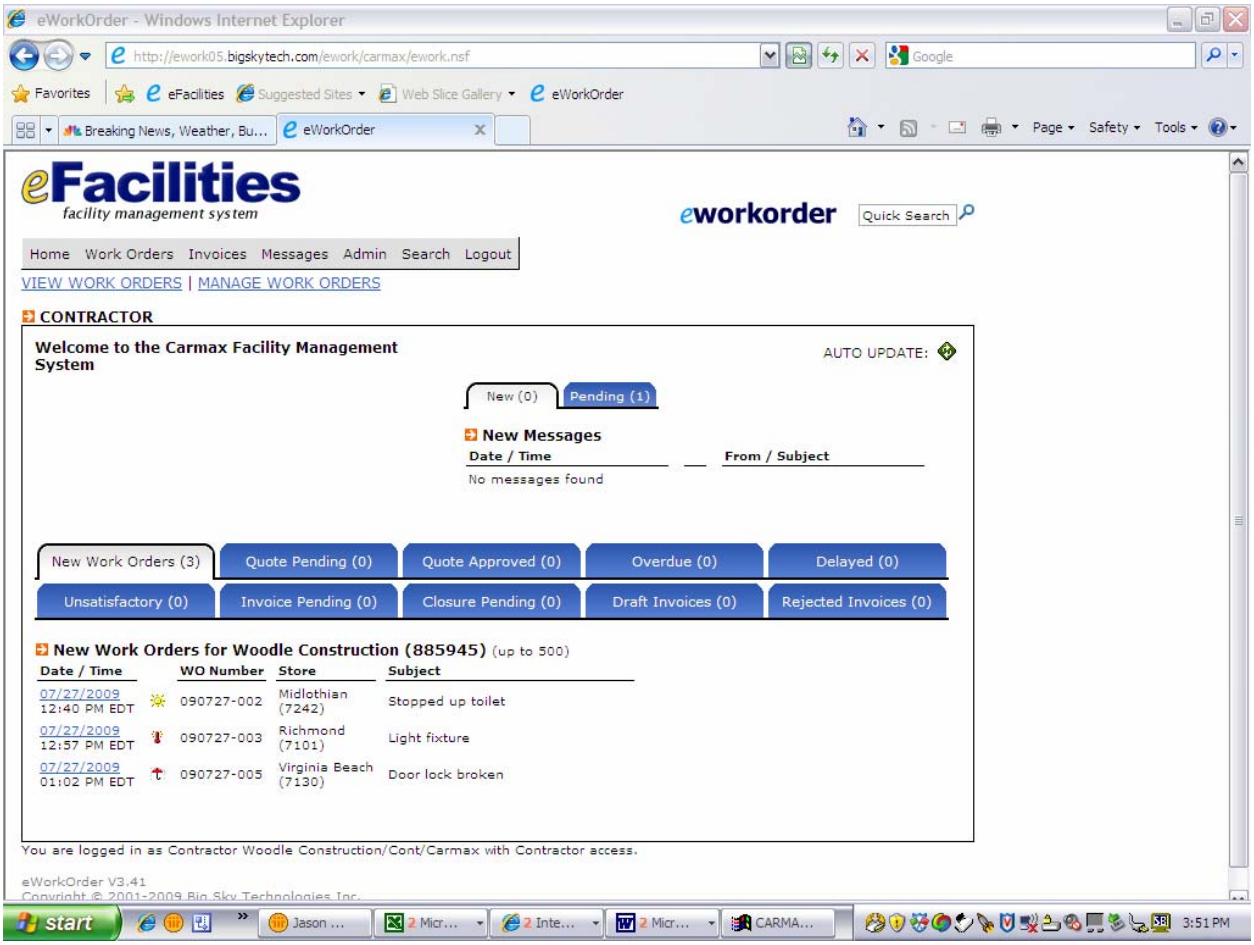
eWorkOrder - Windows Internet Explorer
eFacilities
facility management system
eworkorder
Quick Search
Home Work Orders Invoices Messages Admin Search Logout
VIEW WORK ORDERS | MANAGE WORK ORDERS
CONTRACTOR
Welcome to the Carmax Facility Management System
AUTO UPDATE:
New (0) Pending (1)
New Messages
Date / Time From / Subject
No messages found
New Work Orders (3) Quote Pending (0) Quote Approved (0) Overdue (0) Delayed (0)
Unsatisfactory (0) Invoice Pending (0) Closure Pending (0) Draft Invoices (0) Rejected Invoices (0)
New Work Orders for Woodle Construction (885945) (up to 500)
Date / Time WO Number Store Subject
07/27/2009 12:40 PM EDT 090727-002 Midlothian (7242) Stopped up toilet
07/27/2009 12:57 PM EDT 090727-003 Richmond (7101) Light fixture
07/27/2009 01:02 PM EDT 090727-005 Virginia Beach (7130) Door lock broken
You are logged in as Contractor Woodle Construction/Cont/Carmax with Contractor access.
eWorkOrder V3.41
start
3:51 PM

Figure 18 – Pending Messages

Reply to a Message

Click "Reply" to display a new Message form that already has the To and Subject fields filled in. You can edit the subject and type a Message into the Message field before sending the Message to the recipient.

View all Messages

Messages can be viewed by date, assigned, and status. When a view is displayed, links are available to open the message.

1. **Click "Messages"** from the menu.
2. **Click** the method to view the messages in the drop down list.

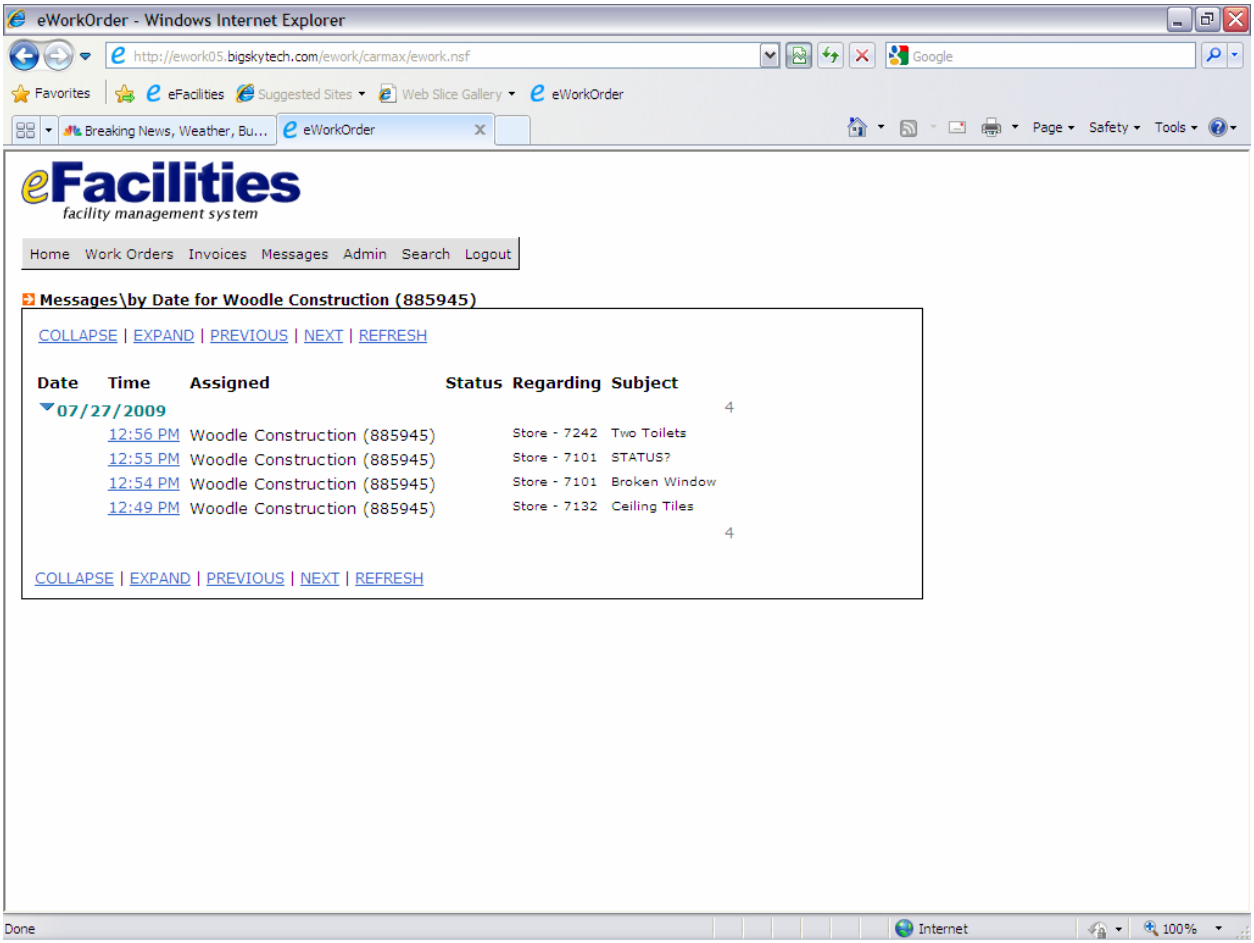

Figure 19 – Messages \ by Date View

Add a Note

The Notes section supplements communication by allowing members of the work group to add notations regarding the current document. Notes can be added to a Work Order document anytime after the document has been saved.

3. **Click "ADD NOTE"** in the notes section of the document.
4. Type in additional information regarding the document in the pop-up window.
5. **Click "UPDATE"** to save the Note in the document.

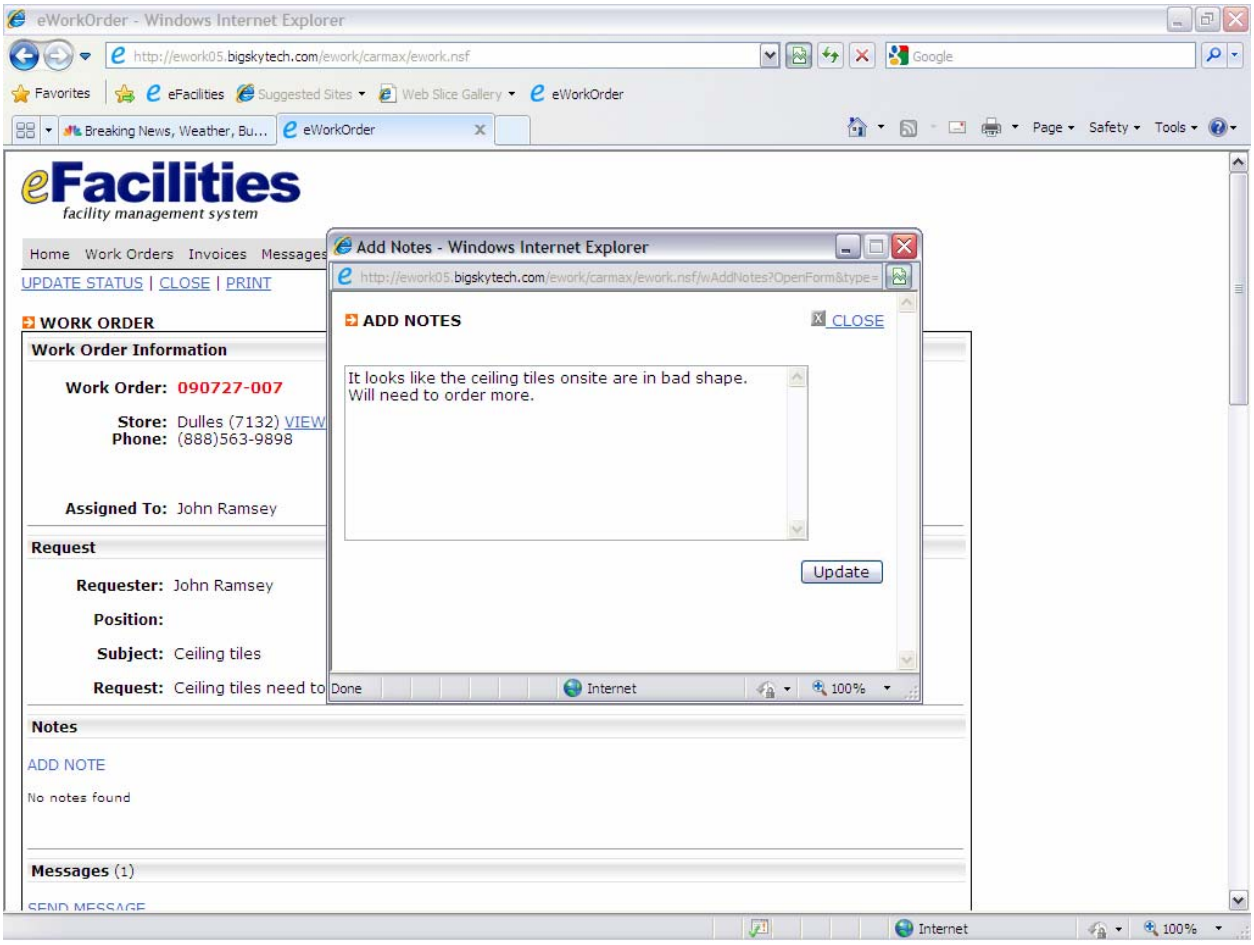

Figure 20 – Add Notes

Attach a File

Files may be attached to a Work Order document to provide additional information. A file may contain a photo, a document, spreadsheet, fax image or any other information type relevant to the current document.

1. **Click "ATTACH FILE"** in the attachments section near the middle of the Work Order to bring up the attach file pop-up window.
2. **Click** "**Browse**" to navigate through local or network directories and select a file.
3. **Click** "**Attach**" to upload and attach the file to the document.

To add a new attachment when the document is in read-only mode, click "ADD ATTACHMENT" in the task bar to display the add attachment dialog.

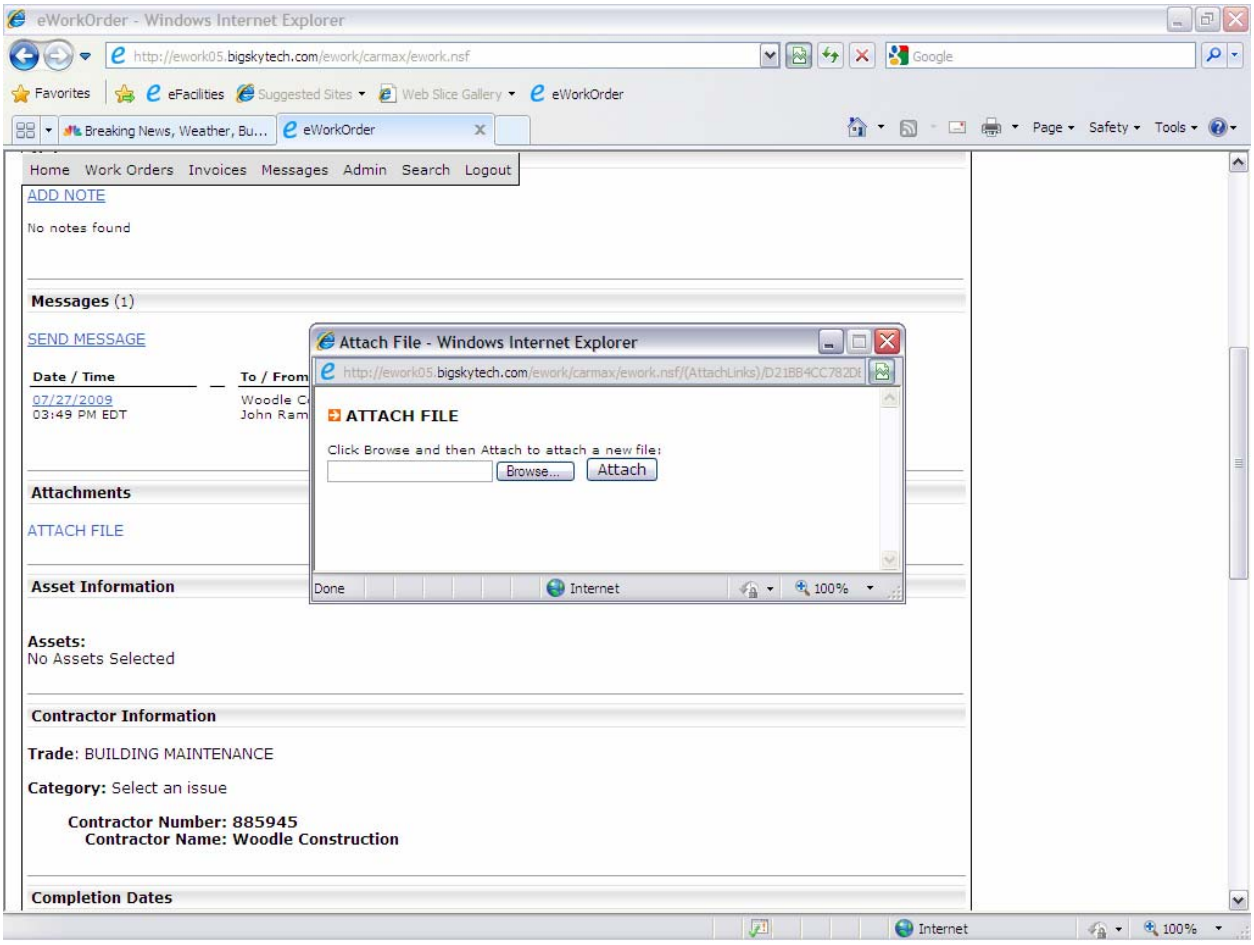

Figure 21 – Attach File

Telephone Support Hotline

The eFacilities Telephone Support Hotline provides the capability to perform routine maintenance workflow procedures from any store telephone. Contractors can perform the following functions:

- Acknowledge a Work Order and record the scheduled service date and time
- Decline a Work Order and record the reason for declining the work
- Obtain the current status of a Work Order
- Log In to a Work Site
- Log Out from a Work Order site and record a status message
- Report Work Complete
- Page a Facility Coordinator

When a New Work Request or Message is created through the Telephone Support Hotline, the voice recording is captured and stored in the associated Work Order or Work Request document, or the recording is sent as a message. The voice recording is displayed within eFacilities as a phone icon. The recording can be played back on any audio enabled computer by clicking on the phone icon.

The following sections describe the typical Telephone Support Hotline options. Menu selections and workflow are depicted in Figure 25 and 26 on pages 38 and 39. The selections may have been customized to meet the specific requirements of your company. Please make sure to listen carefully to the options before making your selection.

Sign In

To begin using the Telephone Support Hotline, call the provided access number from any store telephone. After the initial greeting is played, you will be prompted to enter your Contractor ID and the Work Order number that you would like to take action on. The status of the Work Order is played and you are presented with options based on the current Work Order status. Select the action that you would like to take and follow the prompts to complete the steps.

Acknowledge Work Order

If the current Work Order Status is “Assigned to Contractor”, you are given the option to accept the Work Order. You will be prompted to record the date and time that you have scheduled to service the request.

Decline Work Order

If the current Work Order Status is “Assigned to Contractor”, you are given the option to decline the Work Order. You will be prompted to record the reason for declining the work order.

Log in to a Work Site

If the current Work Order Status is “Assigned to Contractor”, “Acknowledged by Contractor”, “In Progress” or “Delayed”, you are given the option to log in to a work site. Once you have called to log in, please be sure to log out when you are done for the day.

Log out of a Work Site

If the current Work Order Status is “Assigned to Contractor”, “Acknowledged by Contractor”, “In Progress” or “Delayed”, you are given the option to log out of a work site. You will be prompted to indicate if the job is complete, or if you would like to report any delays or unusual conditions.

Report Work Complete

If the current Work Order Status is “Assigned to Contractor”, “Acknowledged by Contractor”, “In Progress” or “Delayed”, you are given the option to report that work is complete. Make sure that you have contacted the Store Manager to confirm completion of the work.

Page the Facility Coordinator

Depending on the system setup, you may be given the option to page the Facility Coordinator. Enter the phone number where you can be reached, beginning with the area code and followed by the pound key. The Facility Coordinator will be paged and you should receive a call shortly.

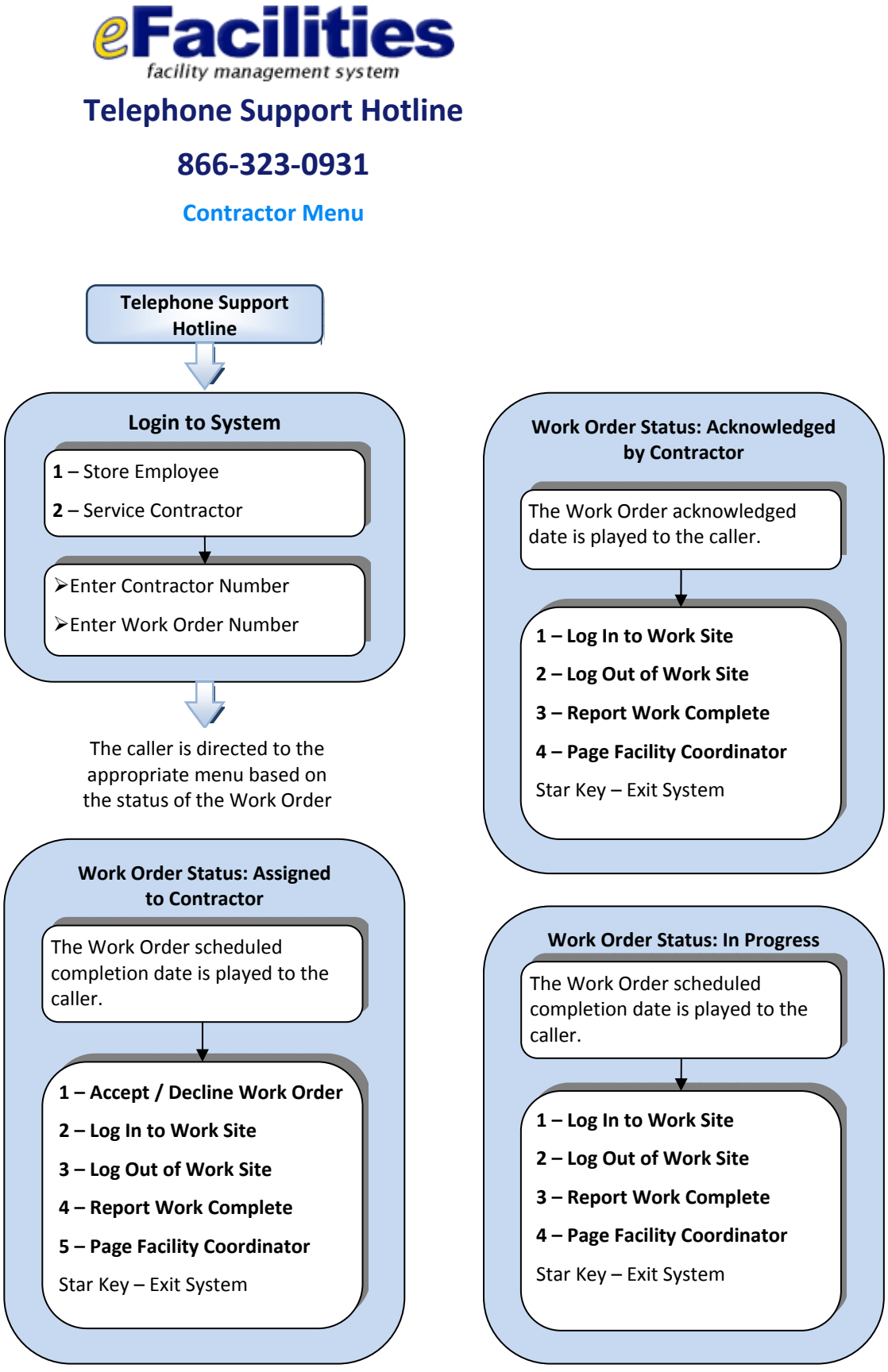
eFacilities
facility management system
Telephone Support Hotline
866-323-0931
Contractor Menu
Telephone Support Hotline
Login to System
1 – Store Employee
2 – Service Contractor
➢Enter Contractor Number
➢Enter Work Order Number
The caller is directed to the appropriate menu based on the status of the Work Order
Work Order Status: Assigned to Contractor
The Work Order scheduled completion date is played to the caller.
1 – Accept / Decline Work Order
2 – Log In to Work Site
3 – Log Out of Work Site
4 – Report Work Complete
5 – Page Facility Coordinator
Star Key – Exit System
Work Order Status: Acknowledged by Contractor
The Work Order acknowledged date is played to the caller.
1 – Log In to Work Site
2 – Log Out of Work Site
3 – Report Work Complete
4 – Page Facility Coordinator
Star Key – Exit System
Work Order Status: In Progress
The Work Order scheduled completion date is played to the caller.
1 – Log In to Work Site
2 – Log Out of Work Site
3 – Report Work Complete
4 – Page Facility Coordinator
Star Key – Exit System

Figure 22 – Telephone Support Hotline Menu

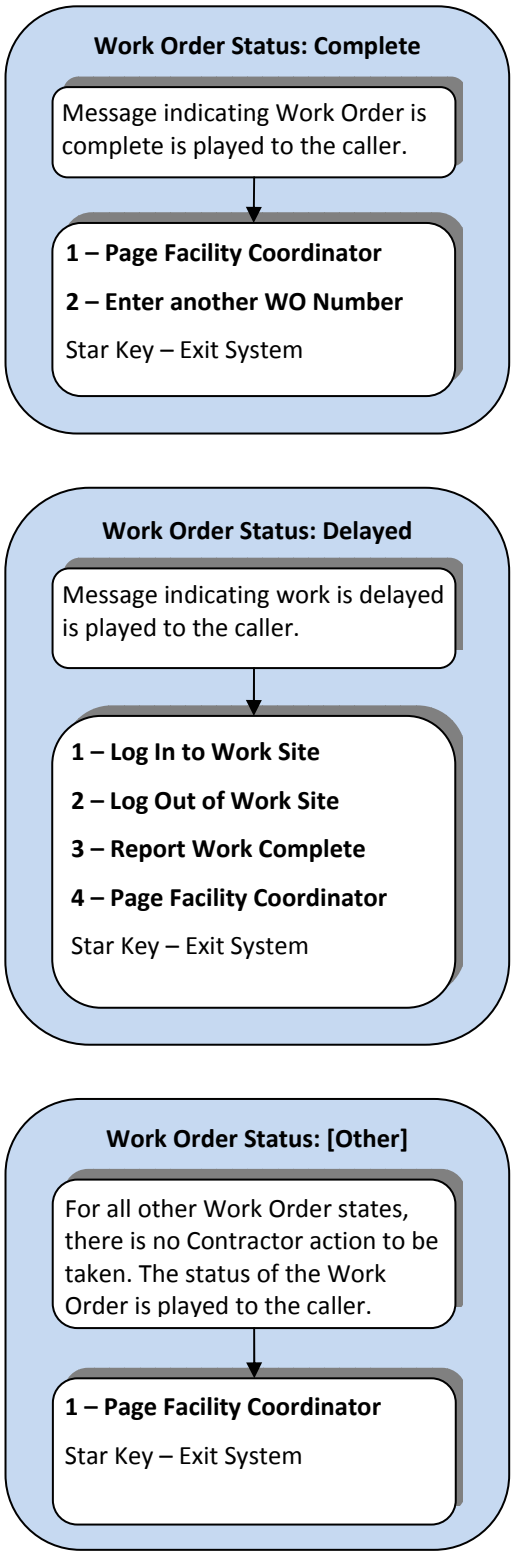
Work Order Status: Complete
Message indicating Work Order is complete is played to the caller.
1 – Page Facility Coordinator
2 – Enter another WO Number
Star Key – Exit System
Work Order Status: Delayed
Message indicating work is delayed is played to the caller.
1 – Log In to Work Site
2 – Log Out of Work Site
3 – Report Work Complete
4 – Page Facility Coordinator
Star Key – Exit System
Work Order Status: [Other]
For all other Work Order states, there is no Contractor action to be taken. The status of the Work Order is played to the caller.
1 – Page Facility Coordinator
Star Key – Exit System

Figure 23 - Telephone Support Hotline Menu